

HOME-BASED HOME VISITS (Part 1)

This guide provides a detailed walkthrough for scheduling home-based home visits. It outlines the necessary steps within ChildPlus Online, ensuring users can easily navigate & input information correctly.

First, you will need to add a Home-based Home Visit EVENT. Then you can add individual home-based home visit ACTIONS.

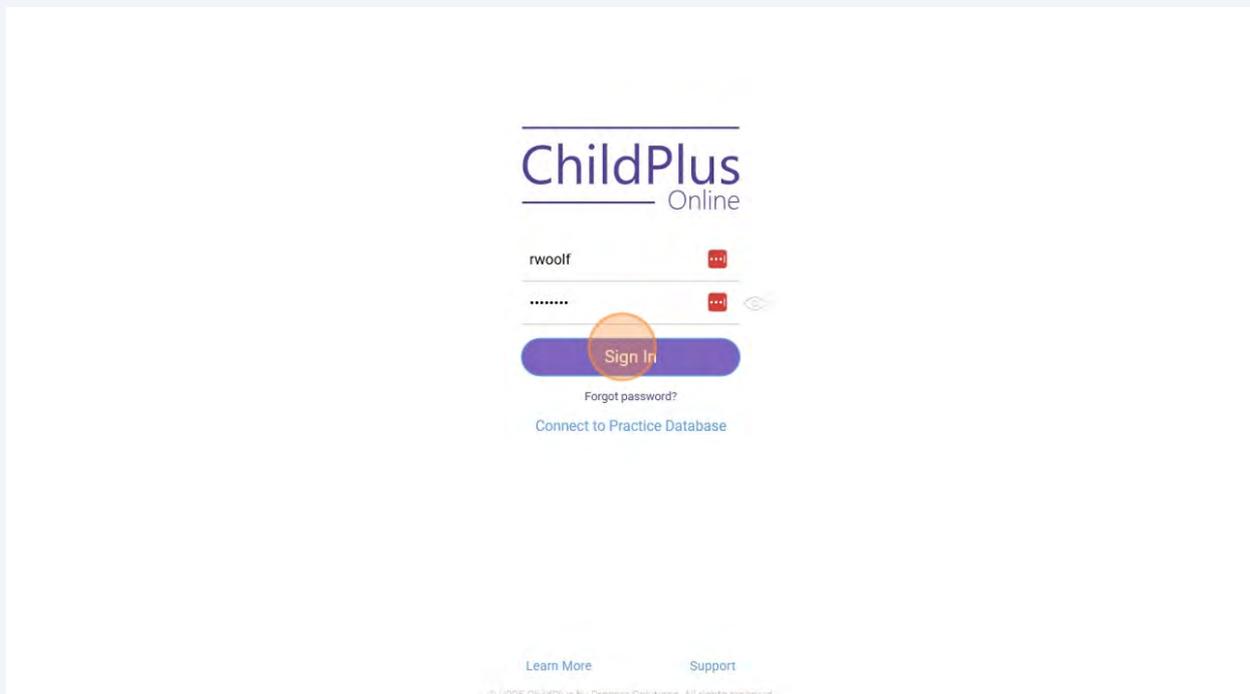
CREATING A NEW EVENT

- 1 Navigate to <https://app.childplus.com/MiamiValley/login>

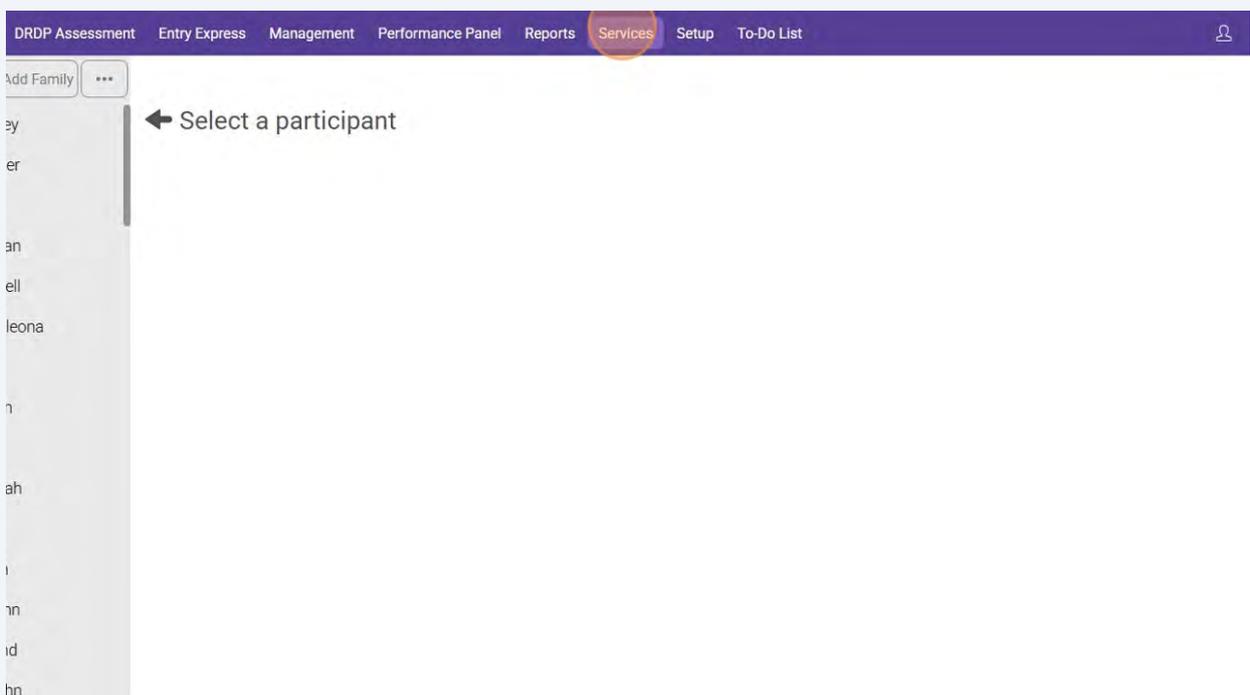


2 Type your Username & Password

Then click the "Sign In" button



3 Click the "Services" module

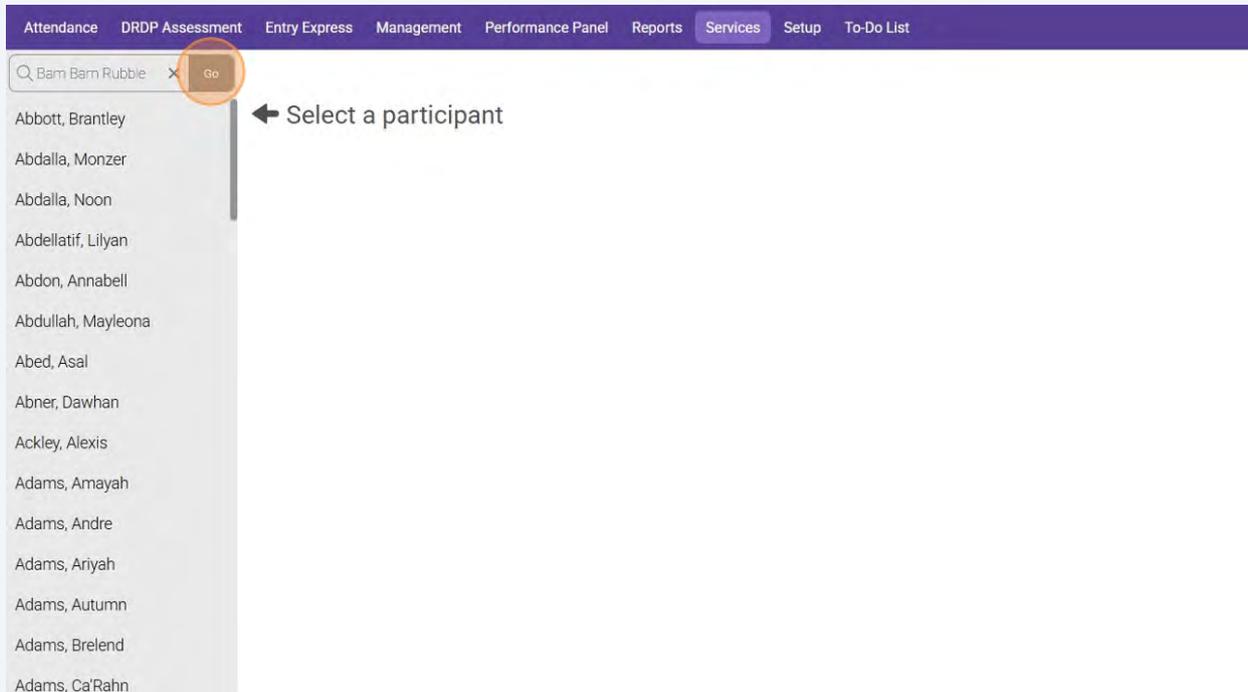


4 Click into the "Search" field

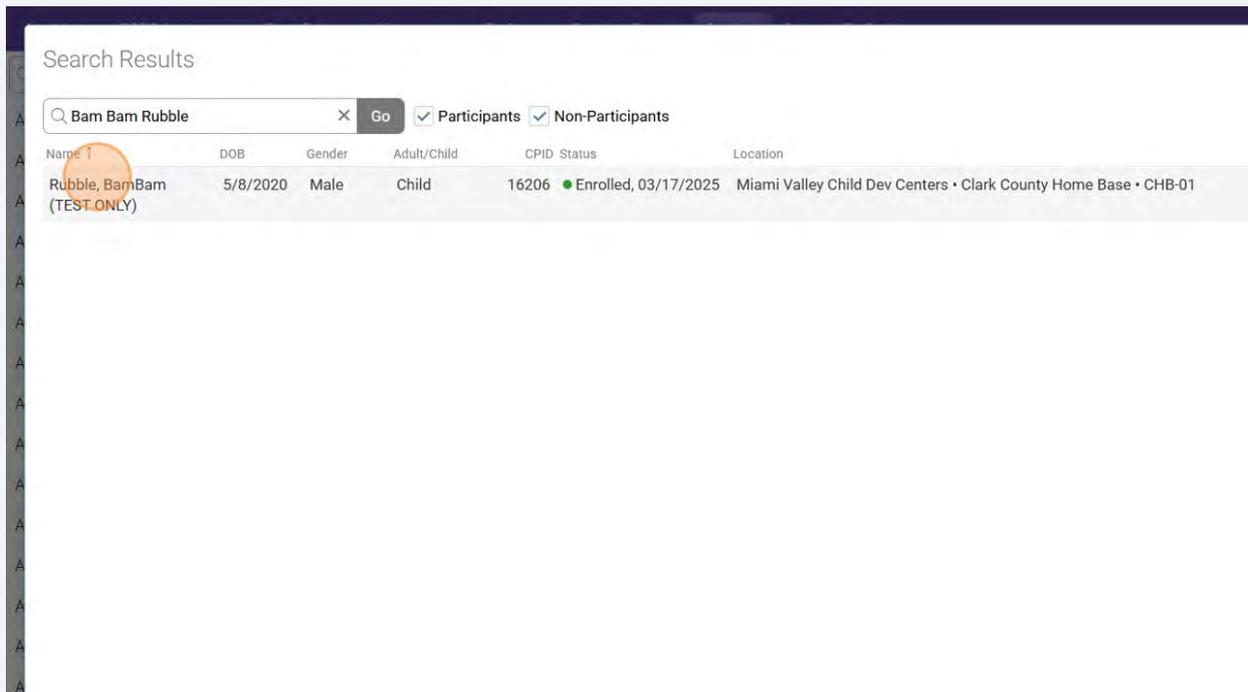
Type your student's name/ part name/ or CPID

Or, click on your student's name from the list

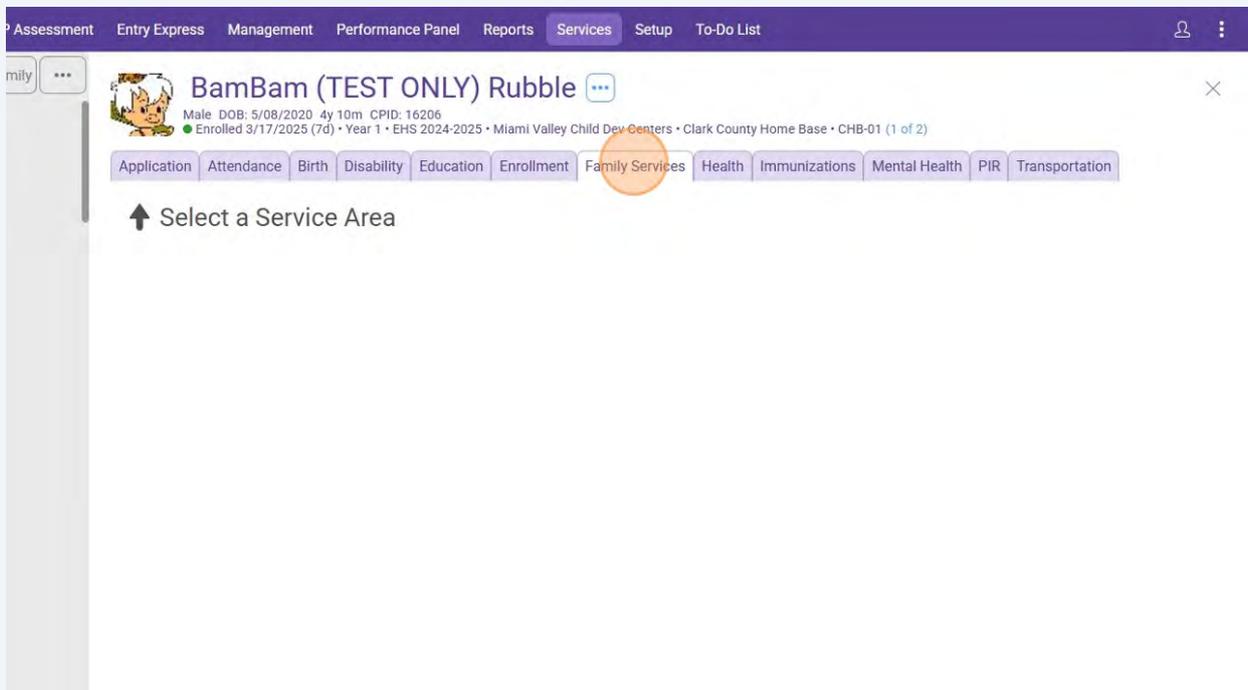
Then click the "Go" button



5 Click on the line with your student's name



6 Click the "Family Services" tab



7 Click the "Add Event" button

The screenshot shows a software interface for a client profile. The client's name is BamBam (TEST ONLY) Rubble. The interface includes a navigation bar with tabs like Assessment, Entry Express, Management, Performance Panel, Reports, Services, Setup, and To-Do List. Below the navigation bar, there are tabs for various services: Application, Attendance, Birth, Disability, Education, Enrollment, Family Services, Health, Immunizations, Mental Health, PIR, and Transportation. The 'Events' tab is selected, and a table of events is displayed. The table has columns for Date, Event, Description, Associated With, Progress, Time, Case Worker, and Actions. One event is listed: 12/14/... Communication Log, associated with BamBam (TEST ONLY), with a progress of 0h 0m and a case worker of Richard Woolf. An 'Add Event' button is highlighted with an orange circle.

Date ↓	Event	Description	Associated With	Progress	Time	Case Worker	Actions
12/14/...	Communication Log		BamBam (TEST ONLY)		0h 0m	Richard Woolf	1

8 Click on "Home-Based Home Visits" from the list of event types

The screenshot shows the same software interface as in step 7, but with a dropdown menu open. The dropdown menu lists various event types, and 'Home-Based Home Visits' is highlighted with an orange circle. The list of event types includes: Childcare Payment Agreement, County or PFCCP Co-Payment Agreement, Emergency/Crisis, Enrollment Contact Log, Family Services Case Notes, Fatherhood/Male Engagement Activity, Fathering Strong Initiative, FSS 1st Home Visit, FSS 2nd Home Visit, FSS Other Home Visit, Group Connection/Socialization, Home-Based Home Visits, Orientation/Open House, and Other Family Engagement Event. A 'CP' badge is visible in the bottom right corner.

- Childcare Payment Agreement
- County or PFCCP Co-Payment Agreement
- Emergency/Crisis
- Enrollment Contact Log
- Family Services Case Notes
- Fatherhood/Male Engagement Activity
- Fathering Strong Initiative
- FSS 1st Home Visit
- FSS 2nd Home Visit
- FSS Other Home Visit
- Group Connection/Socialization
- Home-Based Home Visits
- Orientation/Open House
- Other Family Engagement Event

9 In the "Initial Date" field, type your student's enrollment date

Or, click on the calendar icon, then select the enrollment date

The screenshot shows the 'Add Home-Based Home Visits' form for a student named BamBam (TEST ONLY) Rubble. The form includes fields for 'Initial Date', 'Description', 'Associated With', 'Case Worker', 'Family Members', and 'Progress'. A calendar icon is highlighted with an orange circle next to the 'Initial Date' field. The 'Associated With' dropdown is set to 'Entire Family' and the 'Case Worker' dropdown is set to 'Hilliard, Debra (i)'. There are 'Save' and 'Cancel Add' buttons at the bottom right.

10 Click into the "Description" field

Type the program term years (e.g., 2024-2025) into the "Description Field"

The screenshot shows the 'Add Home-Based Home Visits' form for the same student. The 'Initial Date' field now contains the date '3/24/2025'. The 'Description' field is highlighted with an orange circle and contains a vertical cursor. The other fields and buttons remain the same as in the previous screenshot.



Alert! Create a new Home-based Home Visit EVENT for each program year. Then ACTIONS (individual home visits) are added to each specific program year.

11

Type the name of the Home Visitor into the "Case Worker" field

Or, click the down arrow in the "Case Worker field" and scroll through the list to find the Home Visitor. then, click on the name

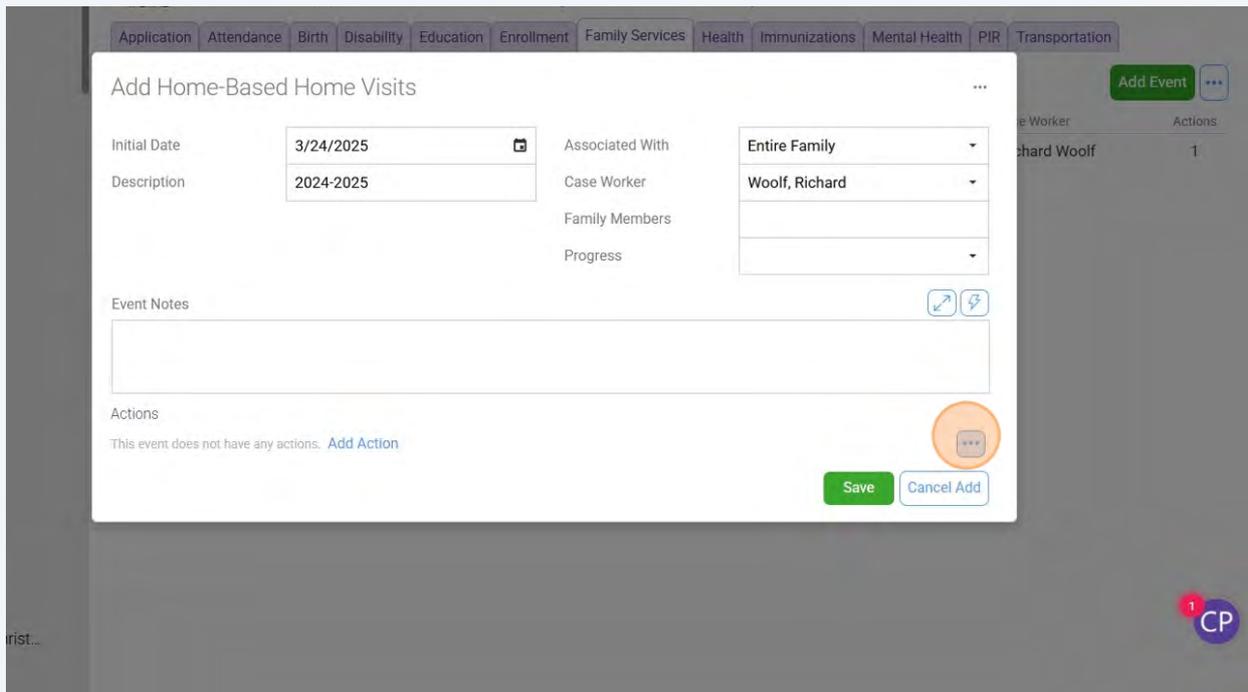
The screenshot shows a software interface for adding home-based home visits. The main header identifies the child as BamBam (TEST ONLY) Rubble, with details like DOB (5/08/2020) and CPID (16206). Below the header are various service tabs. The 'Add Home-Based Home Visits' form is open, showing the following fields:

- Initial Date: 3/24/2025
- Description: 2024-2025
- Associated With: Entire Family
- Case Worker: Hilliard, Debra (highlighted with an orange circle)
- Family Members: (empty)
- Progress: (empty)

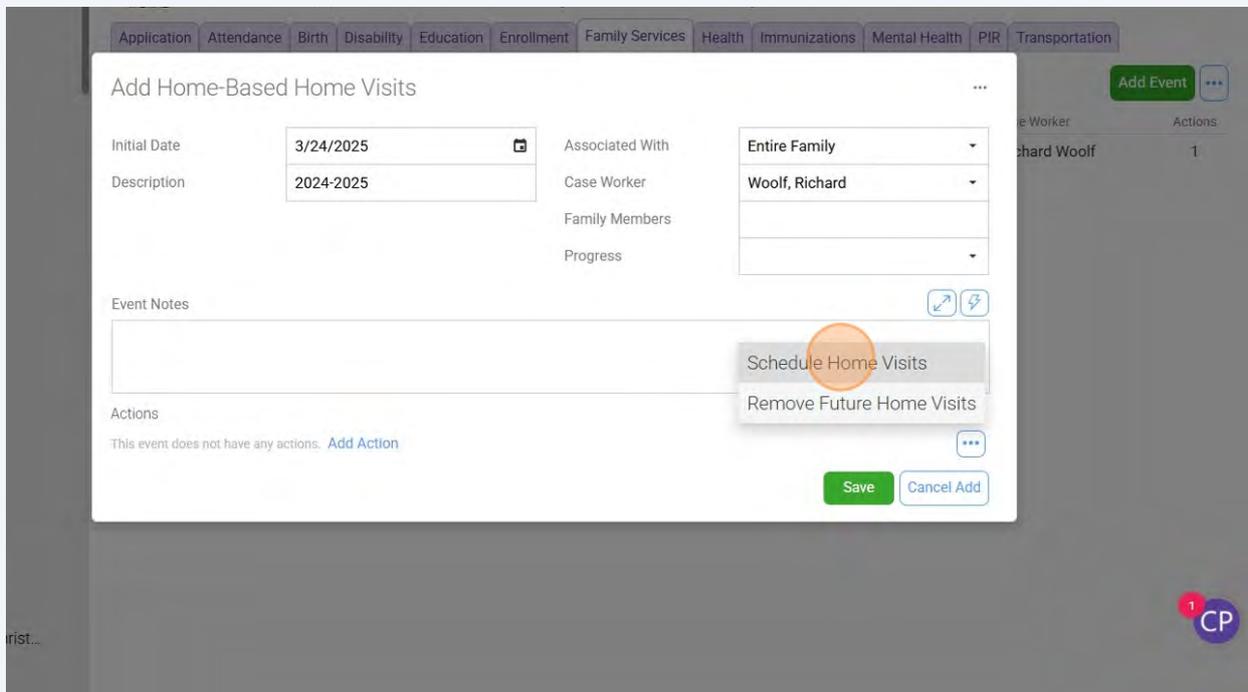
The form also includes an 'Event Notes' section with a text area and a 'Save' button. The 'Actions' section indicates that the event does not have any actions and provides an 'Add Action' link.

SCHEDULING HOME-BASED HOME VISIT ACTIONS

12 Click the three "more" dots button



13 Click on "Schedule Home Visits"



14 Select "For a Home-Based Program"

Attendance DRDP Assessment Entry Express Management Performance Panel Reports Services Setup To-Do List

Search Add Family +++

BamBam (TEST ONLY) Rubble

Abbott, Brantley
Abdalla, Monzer
Abdalla, Noon
Abdellatif, Lilyan
Abdon, Annabell
Abdullah, Mayleona
Abed, Asal
Abner, Dawhan
Ackley, Alexis
Adams, Amayah
Adams, Andre
Adams, Ariyah
Adams, Autumn
Adams, Brelend
Adams, Ca'Rahn

Schedule Home Visits

For a Home-Based Program
 For a Center-Based Program

Schedule a home visit the same day each week...

Starting

Continuing Until

Agency Worker

Hours

Minutes

Description

Add a counter after the description (e.g. Home Visit 1, Home Visit 2, etc.)

Start the counter at

OK Cancel

15 In the "Starting" field, type the date of the first scheduled home visit

Or, click on the calendar icon, then select the date of the first scheduled home visit

Abbott, Brantley
Abdalla, Monzer
Abdalla, Noon
Abdellatif, Lilyan
Abdon, Annabell
Abdullah, Mayleona
Abed, Asal
Abner, Dawhan
Ackley, Alexis
Adams, Amayah
Adams, Andre
Adams, Ariyah
Adams, Autumn
Adams, Brelend
Adams, Ca'Rahn
Adams, Kamoni
Adams-Packnett, Christ...

Schedule Home Visits

For a Home-Based Program
 For a Center-Based Program

Schedule a home visit the same day each week...

Starting

Continuing Until

Agency Worker

Hours

Minutes

Description

Add a counter after the description (e.g. Home Visit 1, Home Visit 2, etc.)

Start the counter at

OK Cancel

April 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

16 In the "Continuing Until" field, type the date of the last scheduled home visit

Or, click on the calendar icon, then select the date of the last scheduled home visit

The screenshot shows a 'Schedule Home Visits' form. The 'Starting' field is set to '4/01/2025'. The 'Continuing Until' field is empty. A calendar overlay is open, showing the month of May 2025. The date '23' is highlighted with an orange circle. The form includes fields for 'Agency Worker', 'Hours', 'Minutes', 'Description', and a checkbox for 'Add a counter after the c...'. There are 'OK' and 'Cancel' buttons at the bottom right.



Tip! You can schedule actions all the way until the end of the program year. But it is recommended to only schedule actions out until the last business day before the next big school break (e.g., winter break, spring break, etc.) where visits won't occur. then you can start scheduling actions again after the break.

17 Type the name of the Home Visitor into the "Agency Worker" field

Or, click the down arrow in the "Agency Worker field" and scroll through the list to find the Home Visitor. then, click on the name

The screenshot shows a web form titled "Schedule Home Visits". On the left is a dark sidebar with a list of names. The main form area contains the following fields and options:

- Radio buttons: For a Home-Based Program, For a Center-Based Program
- Text: "Schedule a home visit the same day each week..."
- Date field: "Starting" with value "4/01/2025"
- Date field: "Continuing Until" with value "5/23/2025"
- Dropdown menu: "Agency Worker" with "Woolf, Richard" selected. A dropdown menu is open showing a table of options:

Name	Primary Site	Position
Woolf, Richard	Admin Office - Horace	Data - Coordinator

- Text fields: "Hours", "Minutes", "Description"
- Checkbox: Add a counter after the description (e.g. Home Visit 1, Home Visit 2, etc.)
- Text field: "Start the counter at" with value "1"
- Buttons: "OK" (green) and "Cancel" (blue)

18

NOTE: A typical Home Visit last 1.5 hours. If your home visits will be scheduled for a different period of time, enter that instead of what was used in this example

Type 1 into the "Hours" field

Type 30 into the "Minutes" field

The screenshot shows the 'Schedule Home Visits' form. The 'Hours' field is highlighted with an orange circle. The form includes the following fields and values:

- Starting: 4/01/2025
- Continuing Until: 5/23/2025
- Agency Worker: Woolf, Richard
- Hours: (highlighted with an orange circle)
- Minutes: (empty)
- Description: (empty)
- Start the counter at: 1

19

Type "HOME VISIT" into the "Description" field

The screenshot shows the 'Schedule Home Visits' form. The 'Description' field is highlighted with an orange circle. The form includes the following fields and values:

- Starting: 4/01/2025
- Continuing Until: 5/23/2025
- Agency Worker: Woolf, Richard
- Hours: 1
- Minutes: 30
- Description: (highlighted with an orange circle)
- Start the counter at: 1

20 Click the "Start the counter at" field

Enter the number you wish the home visits to start at. For the first time setting this up, it will always be 1

The screenshot shows a 'Schedule Home Visits' form. On the left is a dark sidebar with a list of names. The main form area has the following fields and options:

- Radio buttons: For a Home-Based Program, For a Center-Based Program
- Text: Schedule a home visit the same day each week...
- Date fields: Starting (4/01/2025), Continuing Until (5/23/2025)
- Agency Worker dropdown: Woolf, Richard
- Hours field: 1
- Minutes field: 30
- Description field: HOME VISIT
- Checkbox: Add a counter after the description (e.g. Home Visit 1, Home Visit 2, etc.)
- Text field: Start the counter at (containing the number 1, highlighted with an orange circle)
- Buttons: OK (green), Cancel (white)

21 Click the "OK" button

Then click the "Save" button

Schedule Home Visits

For a Home-Based Program
 For a Center-Based Program

Schedule a home visit the same day each week...

Starting: 4/01/2025
Continuing Until: 5/23/2025

Agency Worker: Woolf, Richard
Hours: 1
Minutes: 30
Description: HOME VISIT

Add a counter after the description (e.g. Home Visit 1, Home Visit 2, etc.)
Start the counter at: 1

OK Cancel

22 Your scheduled HOME VISITS will now appear in the ACTIONS box

To open an ACTION, click anywhere on the line it is on

Family Members

Progress

Event Notes

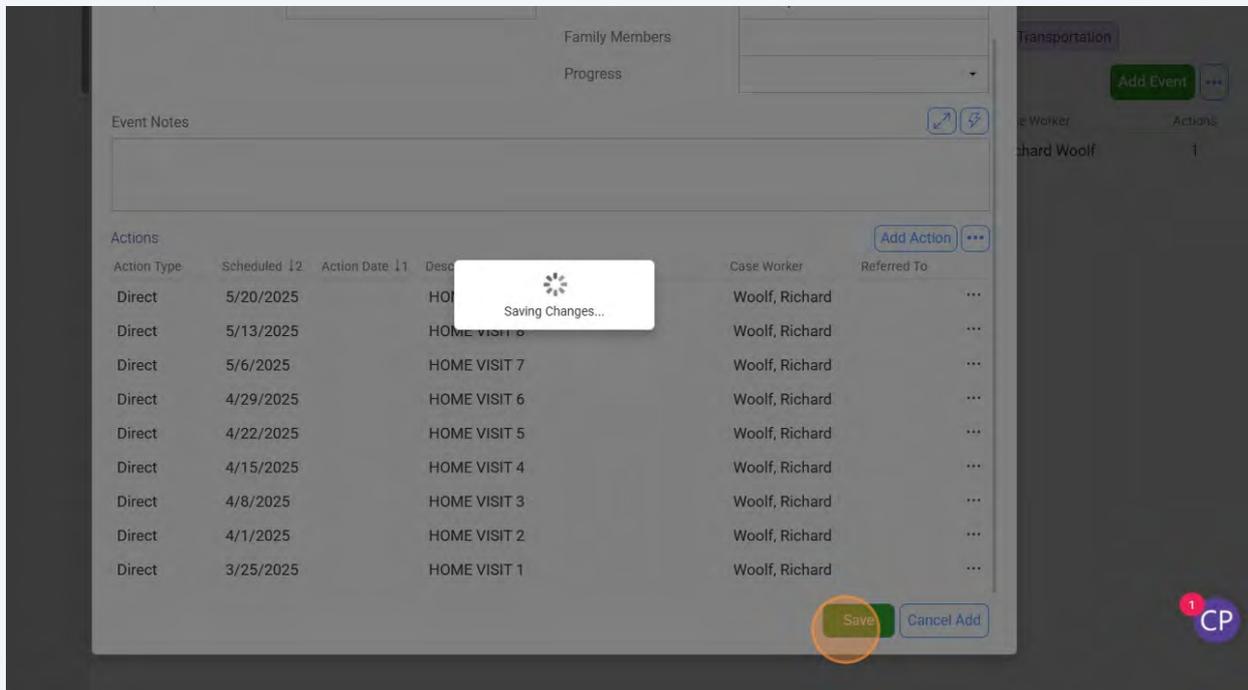
Actions

Action Type	Scheduled ¹²	Action Date ¹¹	Description	Status	Case Worker	Referred To
Direct	5/20/2025		HOME VISIT 9		Woolf, Richard	...
Direct	5/13/2025		HOME VISIT 8		Woolf, Richard	...
Direct	5/6/2025		HOME VISIT 7		Woolf, Richard	...
Direct	4/29/2025		HOME VISIT 6		Woolf, Richard	...
Direct	4/22/2025		HOME VISIT 5		Woolf, Richard	...
Direct	4/15/2025		HOME VISIT 4		Woolf, Richard	...
Direct	4/8/2025		HOME VISIT 3		Woolf, Richard	...
Direct	4/1/2025		HOME VISIT 2		Woolf, Richard	...
Direct	3/25/2025		HOME VISIT 1		Woolf, Richard	...

Add Action ...

Save Cancel Add

23 Click the "Save" button to exit the event



RUNNING REPORTS TO SHOW "ATTENDANCE"



HOME-BASED HOME VISIT REPORT (4140 Home Visits)

Run report 4140 HOME VISITS to see "attendance" log

ACTION DATE: Can select BETWEEN to show dates for a specific time period

EVENT TYPE: Home-based Home Visits

IF EVENT ACTION MEETS THE FILTER CRITERIA: Show all actions

INCLUDE TOTALS FOR SCHEDULED/COMPLETE: Check box

INCLUDE TOTALS FOR EACH STATUS: Check box

REPORT TYPE: Can choose DETAIL to show individual dates or SUMMARY for totals only (e.g., for a review)

GROUP BY: Can group by SITE OR CLASSROOM, depending on need

HOME-BASED HOME VISITS (Part 2)

This guide provides step-by-step instructions for scheduling future weekly home visit actions inside a home-based home visit event. Scheduled actions will appear in the Home-Based Home Visit To-Do list and calendar.

ADDING ACTIONS TO SCHEDULE WEEKLY HOME-BASED HOME VISITS

1 Click on the "HOME-BASED HOME VISITS" event for this program year

The screenshot shows a software interface with a navigation bar at the top containing tabs: Attendance, DRDP Assessment, Entry Express, Management, Performance Panel, Reports, Services, Setup, and To-Do List. Below the navigation bar is a search bar and an 'Add Family' button. A list of family names is visible on the left side, including Abbott, Brantley, Abdalla, Monzer, Abdalla, Noon, Abdellatif, Lilyan, Abdon, Annabell, Abdullah, Mayleona, Abed, Asal, Abner, Dawhan, Ackley, Alexis, Adams, Amayah, Adams, Andre, Adams, Ariyah, Adams, Autumn, Adams, Brelend, and Adams, Ca'Rahn.

The main content area displays the profile for 'BamBam (TEST ONLY) Rubble'. The profile includes a cartoon avatar, gender (Male), DOB (5/08/2020), age (4y 10m), CPID (16206), and enrollment status (Enrolled 3/17/2025 (8d) - Year 1 - EHS 2024-2025 - Miami Valley Child Dev Centers - Clark County Home Base - CHB-01 (1 of 2)). Below the profile are tabs for Application, Attendance, Birth, Disability, Education, Enrollment, Family Services, Health, Immunizations, Mental Health, PIR, and Transportatic. Under the 'Events' tab, there is a table with the following data:

Date ↓	Event	Description	Associated With	Progress	Time	Case Worker
3/25/2...	Home-Based Home Visits	2024-20258	Family		0h 0m	Richard Woolf
12/14/...	Communication Log		BamBam (TEST ONLY)		0h 0m	Richard Woolf

2 Click on the specific "Home Visit" action that you wish to update

The screenshot shows a form titled "Home-Based Home Visits" with fields for Initial Date (3/25/2025), Description (2024-20258), Associated With (Entire Family), Case Worker (Woolf, Richard), Family Members, and Progress. Below these fields is an "Event Notes" section and an "Actions" table. The table has columns for Action Type, Scheduled, Action Date, Description, Status, Case Worker, and Referred To. The row with Action Type "Direct", Scheduled "4/8/2025", Action Date "4/1/2025", and Description "HOME VISITS 2" is highlighted with an orange circle. Below the table are "Save" and "Cancel" buttons.

Action Type	Scheduled	Action Date	Description	Status	Case Worker	Referred To
Direct	4/8/2025	4/1/2025	HOME VISITS 2		Woolf, Richard	...
Direct	3/25/2025		HOME VISITS 1		Woolf, Richard	...

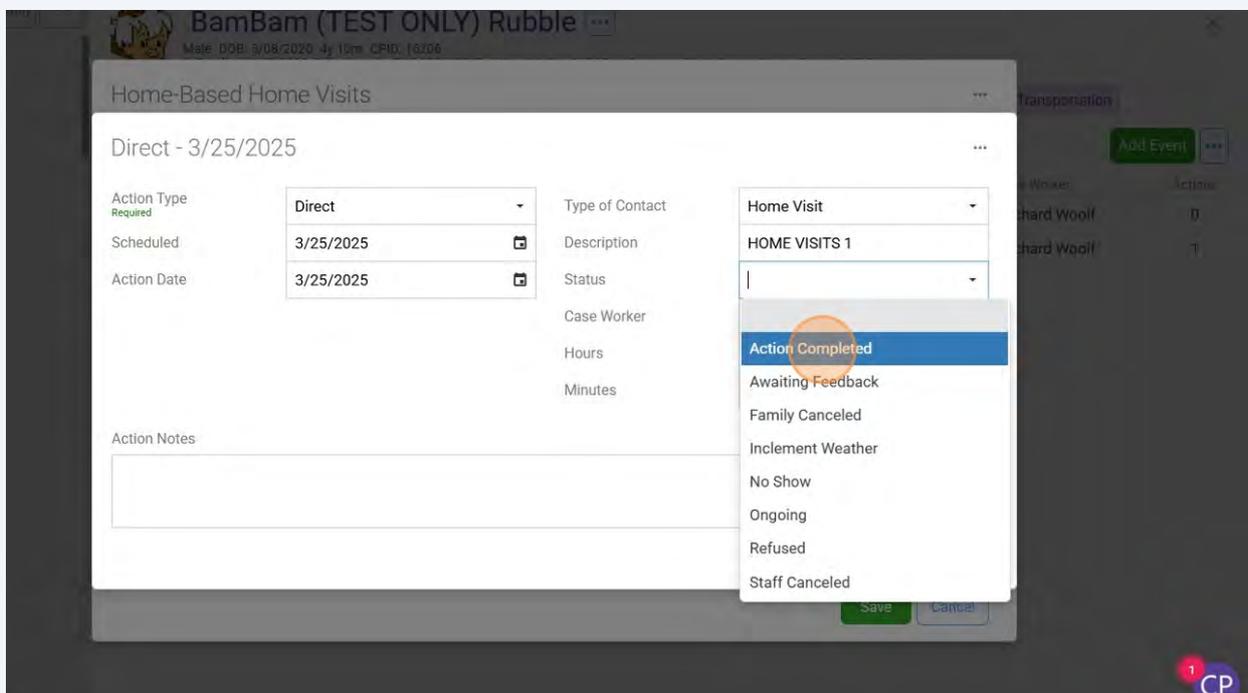
3 In the "Action Date" field, type the date this home visit occurred

Or, click on the calendar icon, then select the date this home visit occurred

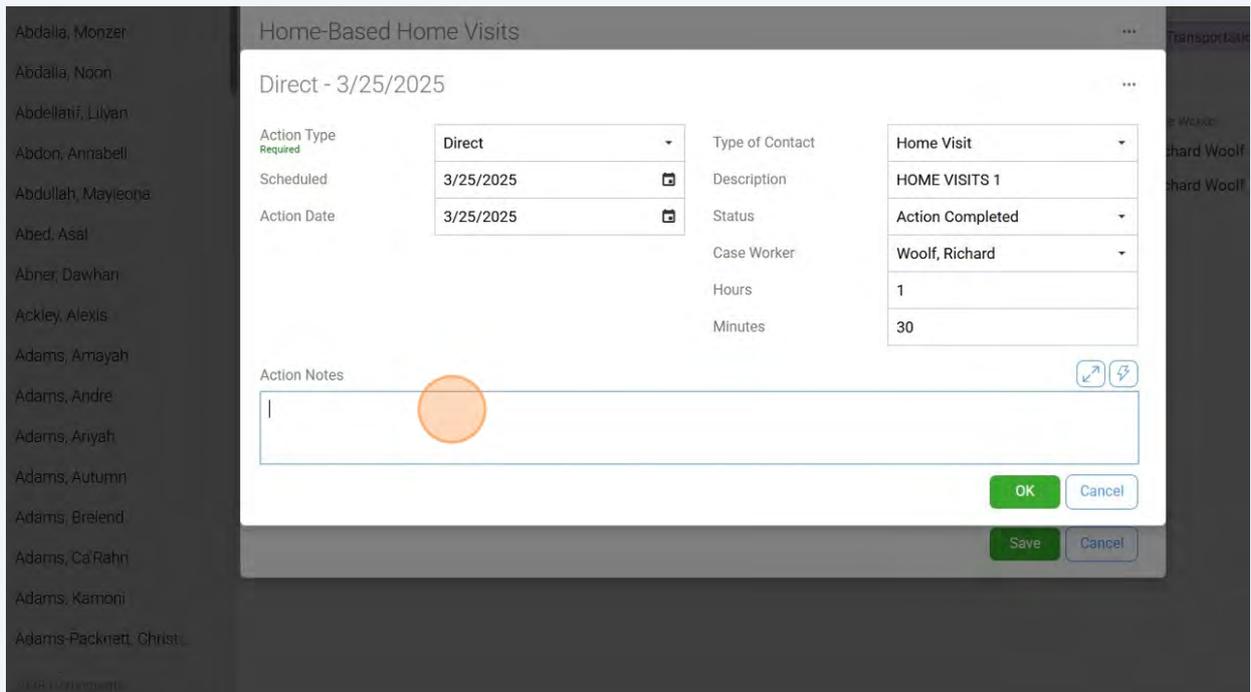
The screenshot shows the same form as above, but with a calendar pop-up open over the "Action Date" field. The calendar is for March 2025, and the date 25 is selected and circled in orange. The form fields are filled with: Action Type (Direct), Scheduled (3/25/2025), Type of Contact (Home Visit), Description (HOME VISITS 1), Status, Case Worker (Woolf, Richard), and a value of 1 in the "Hours" field and 30 in the "Minutes" field. "OK" and "Cancel" buttons are visible at the bottom of the calendar pop-up, and "Save" and "Cancel" buttons are at the bottom of the main form.

4 In the "Status" field, select the status that represents this Home Visit

- Action Completed
- Awaiting Feedback
- Family Canceled
- Inclement Weather
- No Show (always use Family Canceled instead of No Show)
- On Going
- Refused
- Staff Canceled



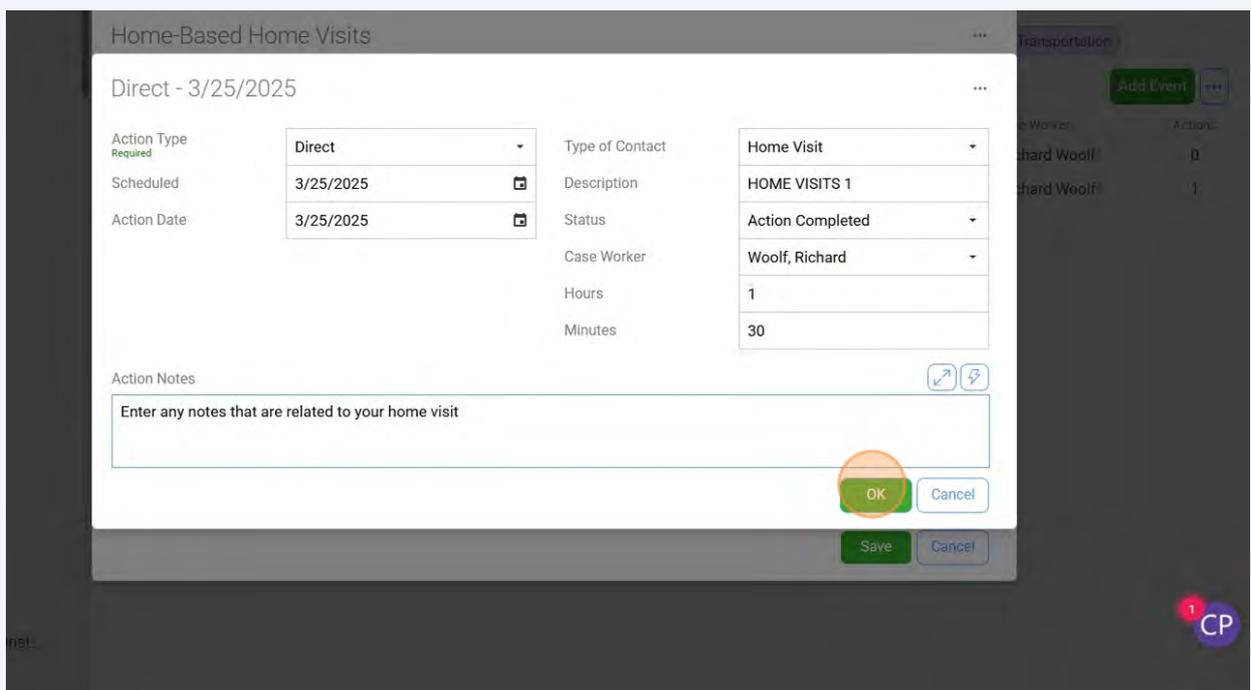
5 Click into the "Action Notes" field



6 Enter any brief notes about the status or home visit that you would need to see in ChildPlus

For example, if a family cancels you may want to include why and when the home visit is expected to be rescheduled

When done, click the "OK" button





NOTE: More detailed notes about the home visit are likely documented in a separate database application. If so, then you do not need to leave detailed notes in the action as well.

7

Notice that the action date and status has changed for this action in the list of all actions

Click the "Save" button

The screenshot shows a form titled "Home-Based Home Visits" with the following fields:

- Initial Date: 3/25/2025
- Description: 2024-20258
- Associated With: Entire Family
- Case Worker: Woolf, Richard
- Family Members: (empty)
- Progress: (empty)
- Event Notes: (empty text area)

Below the form is an "Actions" table:

Action Type	Scheduled	Action Date	Description	Status	Case Worker	Referred To
Direct	3/25/2025	3/25/2025	HOME VISITS 1	Action Completed	Woolf, Richard	...
Direct	4/8/2025		HOME VISITS 3		Woolf, Richard	...
Direct	4/1/2025		HOME VISITS 2		Woolf, Richard	...

The "Save" button is highlighted with a red circle. In the background, a table shows "Richard Woolf" with an "Actions" count of 0 and 1.

HOME-BASED HOME VISITS (Part 3)

This guide provides a step-by-step instructions for when a specific home-based home visit needs to be rescheduled.

RESCHEDULING A SINGLE HOME VISIT

1 Navigate to the Family Services module

BamBam (TEST ONLY) Rubble
Male DOB: 5/08/2020 4y 10m CPID: 16206
Enrolled 3/17/2025 (8d) - Year 1 - EHS 2024-2025 - Miami Valley Child Dev Centers - Clark County Home Base - CHB-01 (1 of 2)

Application Attendance Birth Disability Education Enrollment Family Services Health Immunizations Mental Health PIR Transportation

Attachments Events FPA, Needs Assessment, PIR Family Engagement Contract Family Outcomes Family Partnership Tracker Information [Add Eve](#)

Date	Event	Description	Associated With	Progress	Time	Case Worker
3/25/2024	Home-Based Home Visits	2024-20258	Family		1h 30m	Richard Woolf
12/14/2023	Communication Log		BamBam (TEST ONLY)		0h 0m	Richard Woolf

2 Click on the "HOME-BASED HOME VISITS" event for this program year

Attendance DRDP Assessment Entry Express Management Performance Panel Reports Services Setup To-Do List

Search Add Family

BamBam (TEST ONLY) Rubble ...
Male DOB: 5/08/2020 4y 10m CPID: 16206
Enrolled 3/17/2025 (8d) • Year 1 • EHS 2024-2025 • Miami Valley Child Dev Centers • Clark County Home Base • CHB-01 (1 of 2)

Application Attendance Birth Disability Education Enrollment Family Services Health Immunizations Mental Health PIR Transportation

Attachments Events FPA, Needs Assessment, PIR Family Engagement Contract Family Outcomes Family Partnership Tracker Information

Date	Event	Description	Associated With	Progress	Time	Case Worker
3/25/2...	Home-Based Home Visits	2024-20258	Family		1h 30m	Richard Woolf
12/14/...	Communication Log		BamBam (TEST ONLY)		0h 0m	Richard Woolf

3 Click on the specific "Home Visit" action that you wish to update

Home-Based Home Visits ...

Initial Date: 3/25/2025 📅 Associated With: Entire Family ▼

Description: 2024-20258 Case Worker: Woolf, Richard ▼

Family Members: ▼

Progress: ▼

Event Notes: 📄 🔍

Action Type	Scheduled 12	Action Date 11	Description	Status	Case Worker	Referred To
Direct	3/25/2025	3/25/2025	HOME VISITS 1	Action Completed	Woolf, Richard	...
Direct	4/8/2025		HOME VISITS 3		Woolf, Richard	...
Direct	4/1/2025		HOME VISITS 2		Woolf, Richard	...

Add Action ...

Save Cancel

4 If you do not go on a Home Visit, DO NOT enter a date into the "Action Date" field

Attendance DRDP Assessment Entry Express Management Performance Panel Reports Services Setup To-Do List

Search Add Family

BamBam (TEST ONLY) Rubble Male DOB: 5/08/2020 4y 10m CPID: 16206

Home-Based Home Visits

Direct scheduled for 4/01/2025

Action Type <small>Required</small>	Direct	Type of Contact	Home Visit
Scheduled	4/01/2025	Description	HOME VISITS 2
Action Date		Status	
		Case Worker	Woolf, Richard
		Hours	1
		Minutes	30

Action Notes

OK Cancel

Save Cancel

5 Enter an appropriate status into the "Status" field

For example: Family Canceled, Inclement Weather, Staff Cancelled

Assessment Entry Express Management Performance Panel Reports Services Setup To-Do List

BamBam (TEST ONLY) Rubble Male DOB: 5/08/2020 4y 10m CPID: 16206

Home-Based Home Visits

Direct scheduled for 4/01/2025

Action Type <small>Required</small>	Direct	Type of Contact	Home Visit
Scheduled	4/01/2025	Description	HOME VISITS 2
Action Date		Status	
		Case Worker	Woolf, Richard
		Hours	1
		Minutes	30

Action Notes

OK Cancel

Save Cancel

6

Enter any brief notes about the status or home visit that you would need to see in ChildPlus

For example, if a family cancels you may want to include why and when the home visit is expected to be rescheduled

When done, click the "OK" button

Home-Based Home Visits

Direct scheduled for 4/01/2025

Action Type Required: Direct

Scheduled: 4/01/2025

Action Date:

Type of Contact: Home Visit

Description: HOME VISITS 2

Status: Family Canceled

Case Worker: Woolf, Richard

Hours: 1

Minutes: 30

Action Notes: Child is ill and going to urgent care. Will reschedule for Friday.

OK Cancel

Save Cancel

7

Click "Add Action" to schedule a "make up" home visit

Home-Based Home Visits

Initial Date: 3/25/2025

Description: 2024-20258

Associated With: Entire Family

Case Worker: Woolf, Richard

Family Members:

Progress:

Event Notes:

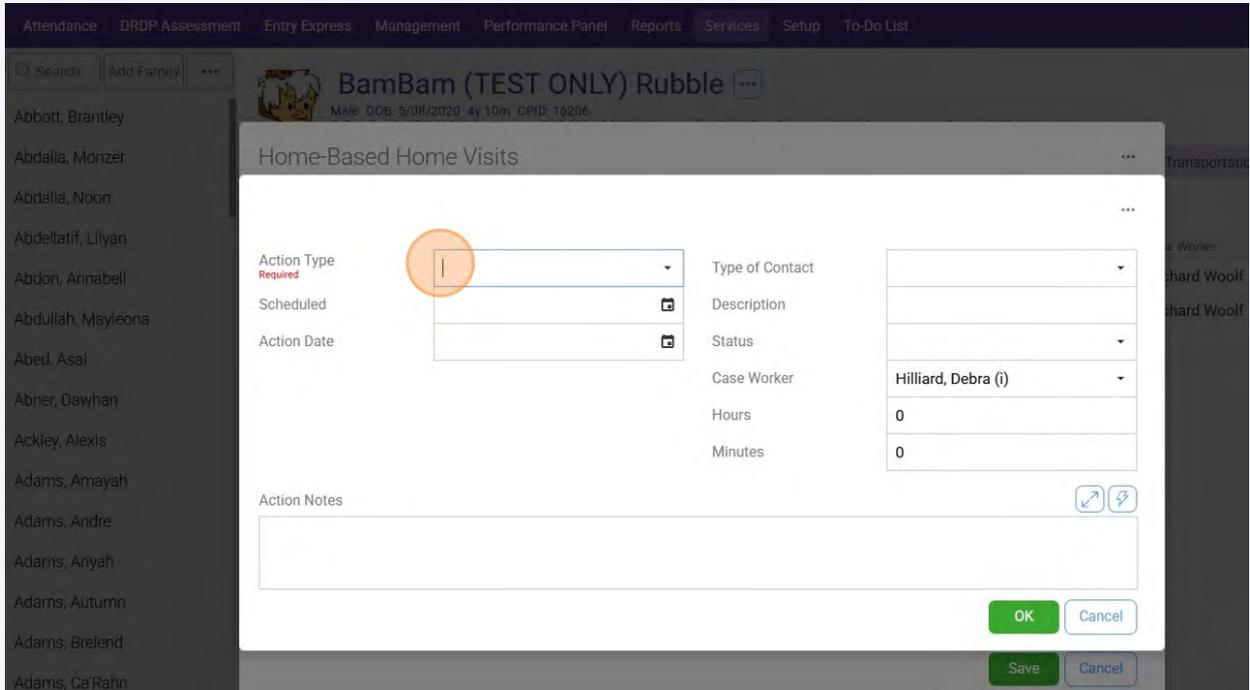
Actions

Action Type	Scheduled ¹²	Action Date ¹¹	Description	Status	Case Worker	Referred To
Direct	3/25/2025	3/25/2025	HOME VISITS 1	Action Completed	Woolf, Richard	...
Direct	4/8/2025		HOME VISITS 3		Woolf, Richard	...
Direct	4/1/2025		HOME VISITS 2	Family Canceled	Woolf, Richard	...

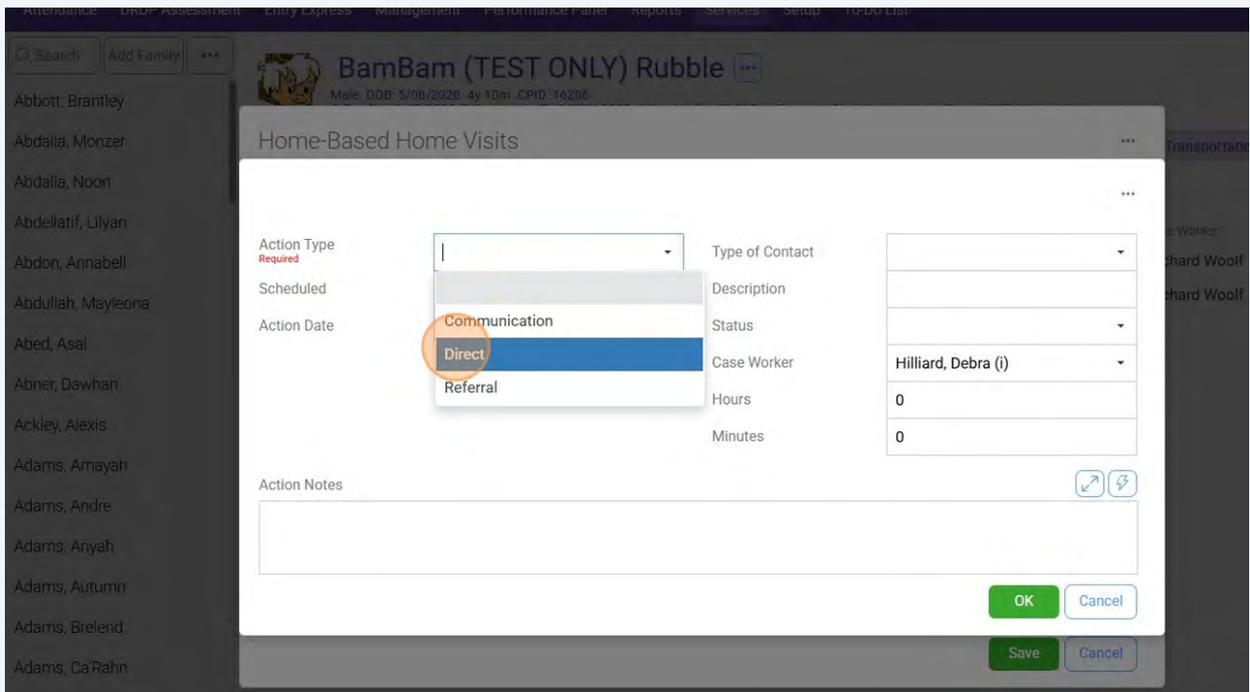
Add Action

Save Cancel

8 Click the "Action Type" field.

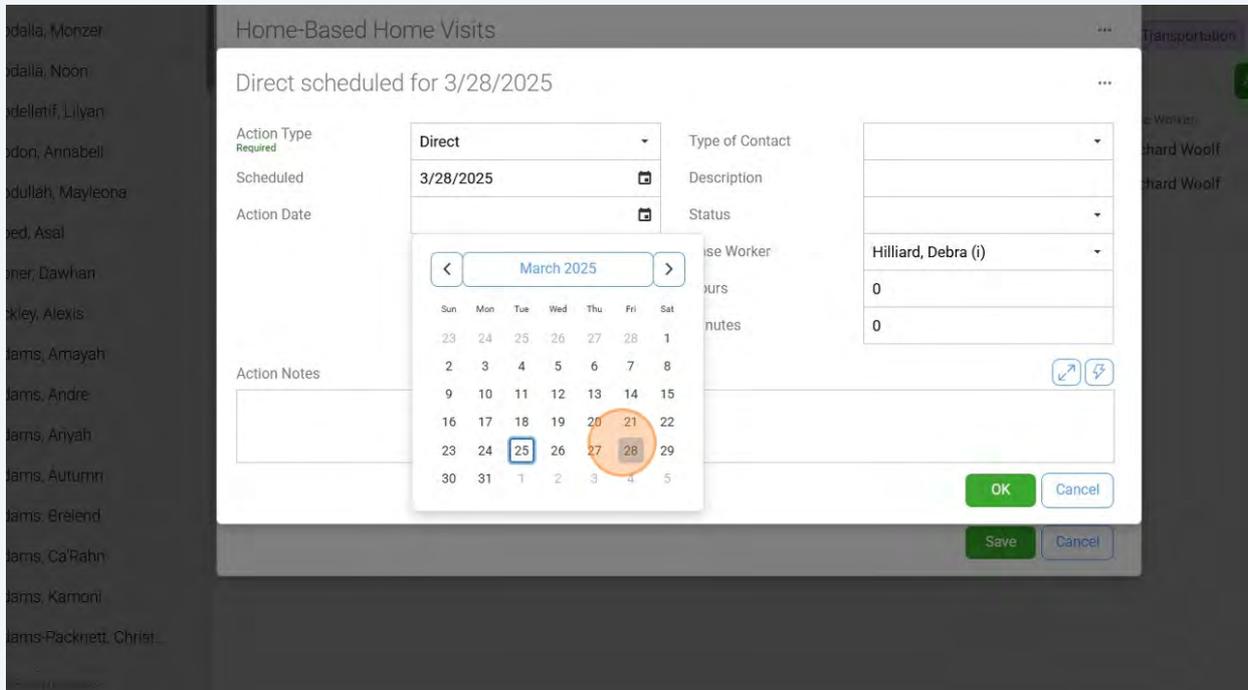


9 Click "Direct"

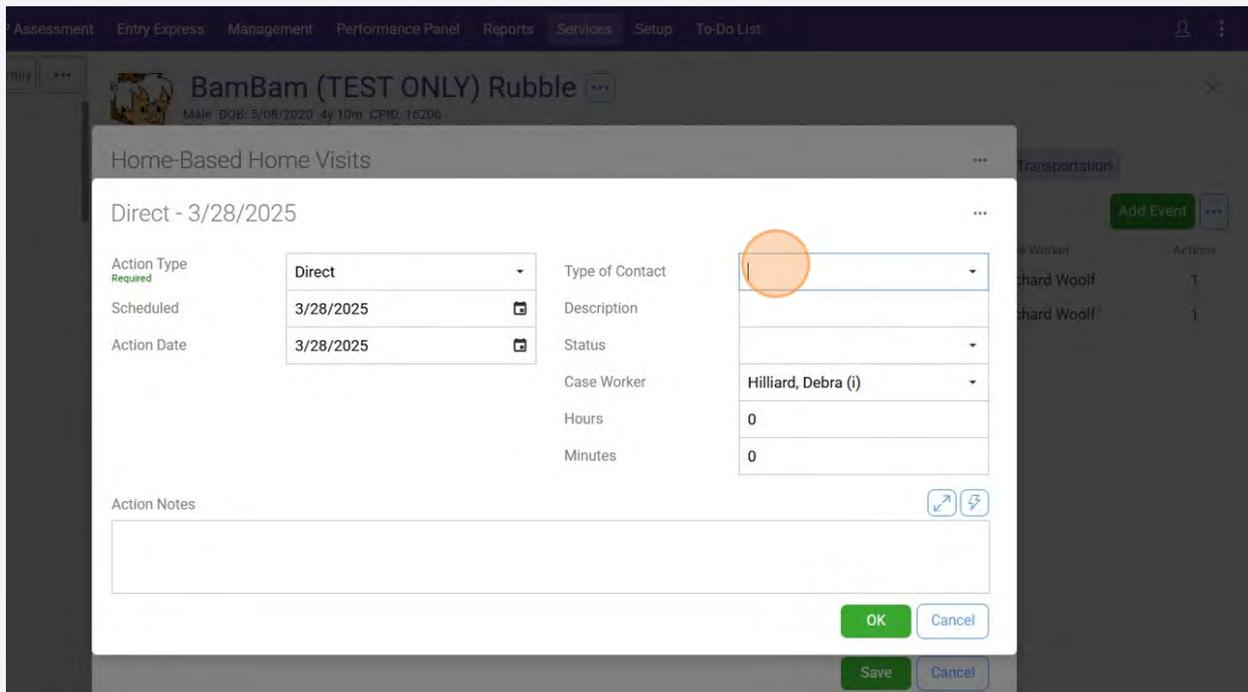


10 In the "Action Date" field, type the date this make up home visit occurred

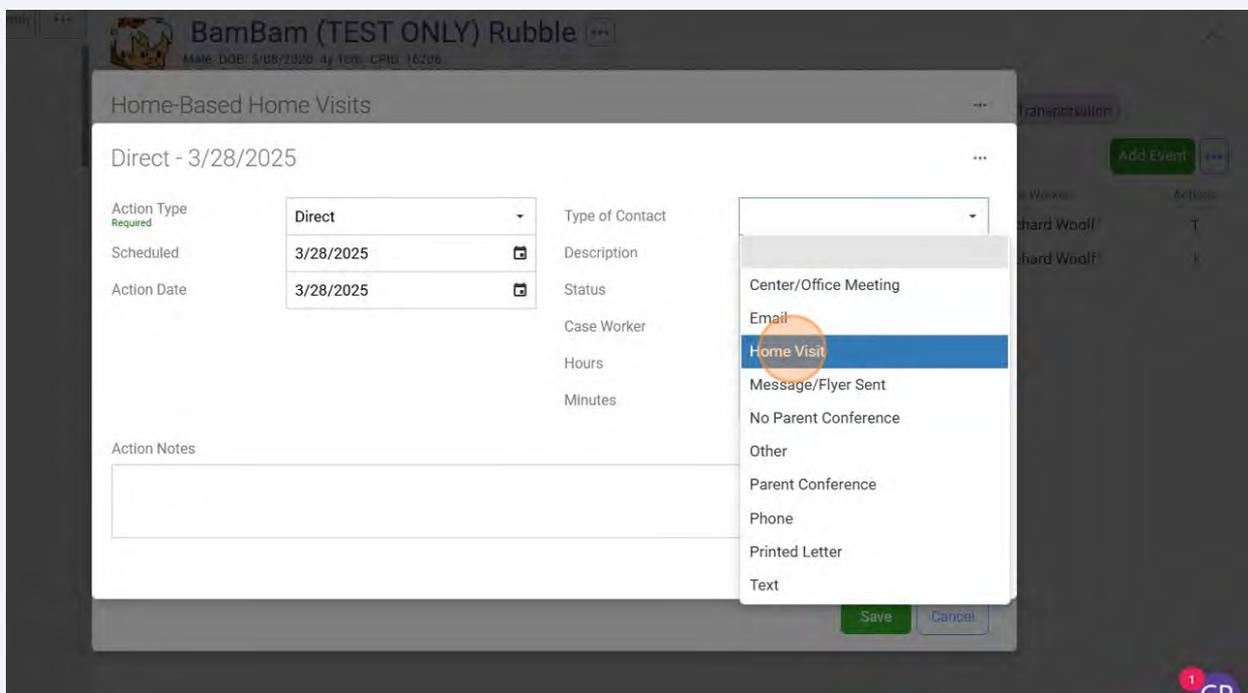
Or, click on the calendar icon, then select the date this make up home visit occurred



11 Click the "Type of Contact" field.



12 Select "Home Visit" from the drop-down list



13 Click the "Description" field.

The screenshot shows a software interface for managing home visits. At the top, there is a navigation bar with options like 'Assessment', 'Entry Express', 'Management', 'Performance Panel', 'Reports', 'Services', 'Setup', and 'To-Do List'. Below this, the user's profile is displayed as 'BamBam (TEST ONLY) Rubble' with a male icon and personal details: 'Male DOB: 5/05/2020 4y 10m CPID: 16206'. The main content area is titled 'Home-Based Home Visits' and shows a form for a 'Direct - 3/28/2025' visit. The form fields are as follows:

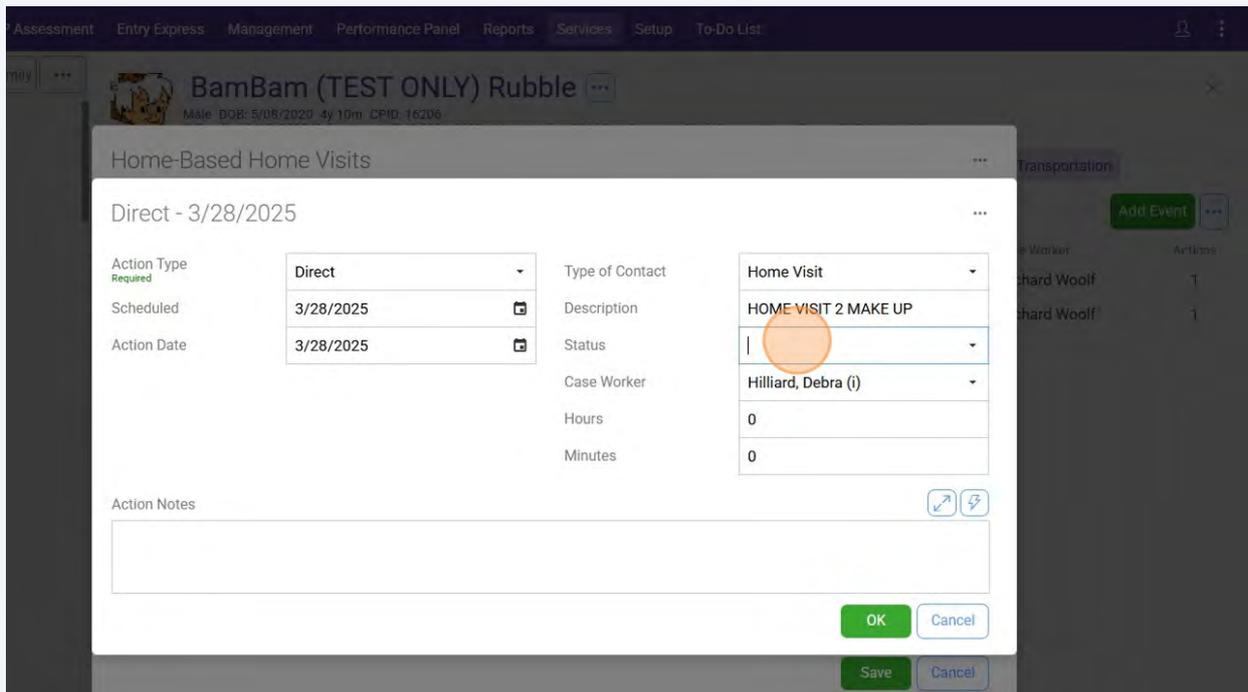
Action Type <small>Required</small>	Direct	Type of Contact	Home Visit
Scheduled	3/28/2025	Description	
Action Date	3/28/2025	Status	
		Case Worker	Hilliard, Debra (i)
		Hours	0
		Minutes	0

Below the form is an 'Action Notes' section with a text input field and two icons (a blue arrow and a blue square with a diagonal line). At the bottom right of the form are two buttons: a green 'OK' button and a white 'Cancel' button. Below the form, there are also 'Save' and 'Cancel' buttons. The 'Description' field is highlighted with an orange circle.

14 Enter text to identify this action with the original action

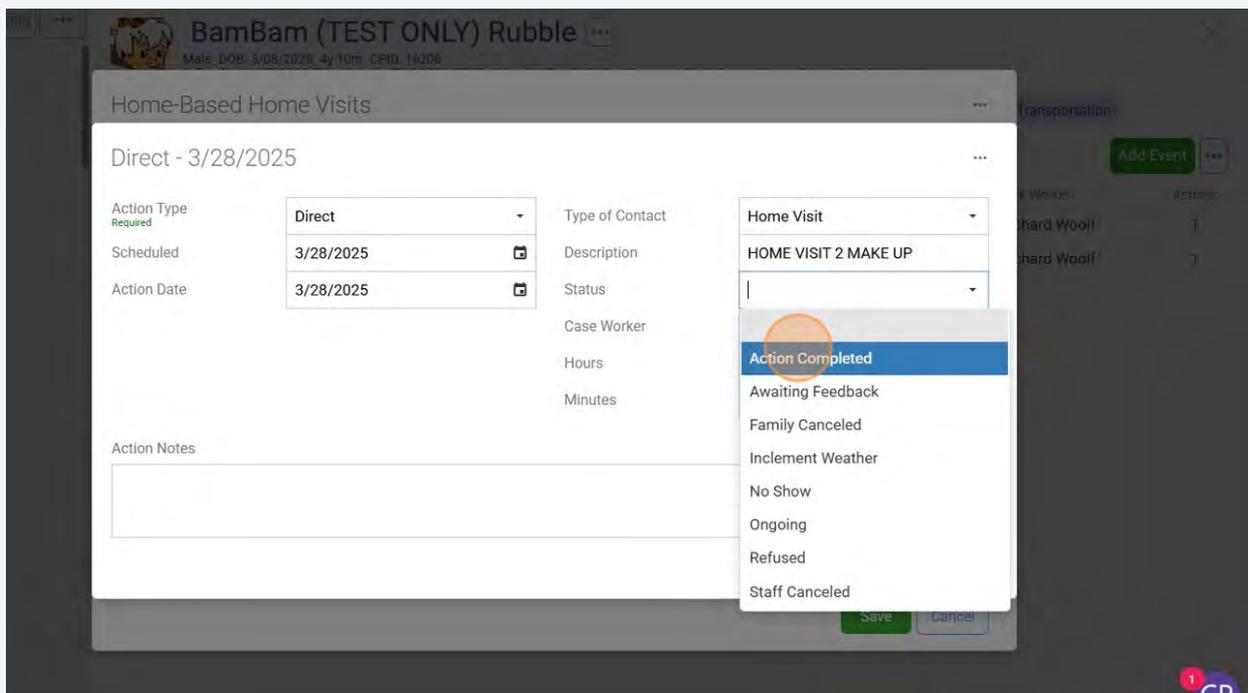
For example: "HOME VISIT 2 Make Up"

15 Click the "Status" field.



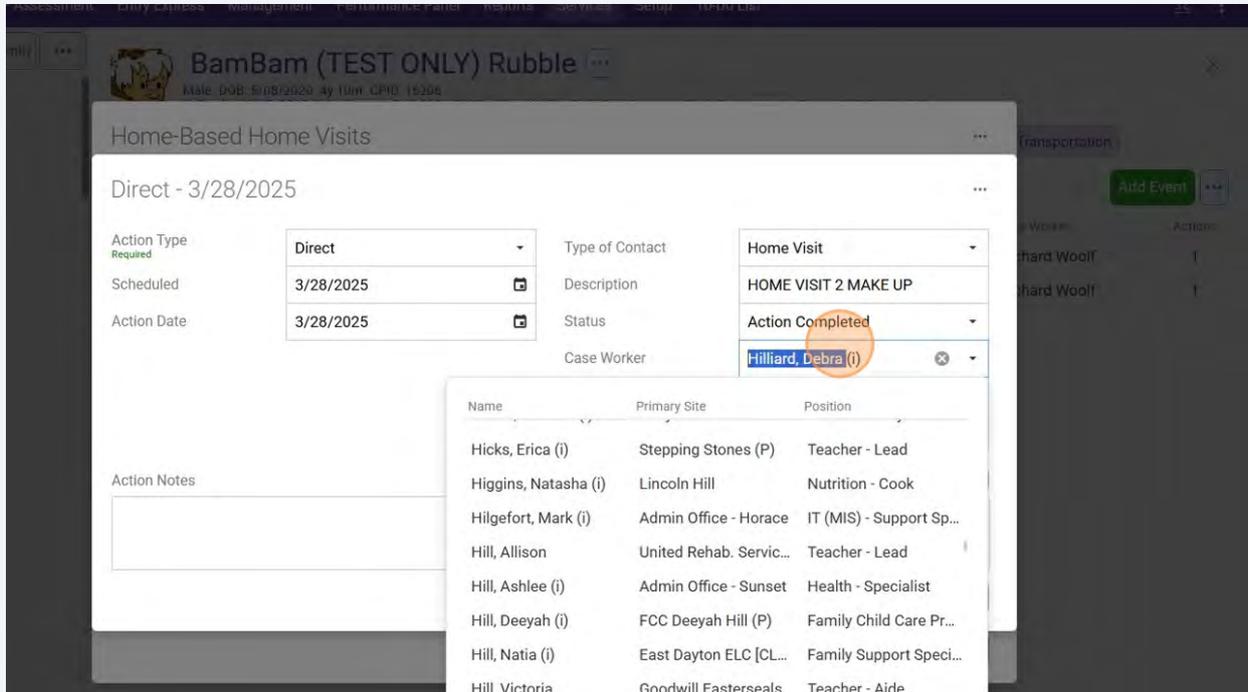
16 Select status that represents this make up Home Visit

For this example, "Action Completed" was used



17 Type the name of the Home Visitor into the "Case Worker" field

Or, click the down arrow in the "Case Worker" field and scroll through the list to find the Home Visitor. then, click on the name



18

NOTE: A typical Home Visit last 1.5 hours. If your home visits will be scheduled for a different period of time, enter that instead of what was used in this example

Type 1 into the "Hours" field

Type 30 into the "Minutes" field

BamBam (TEST ONLY) Rubble
Male DOB: 3/08/2020 Jy 10m CPID: 16206

Home-Based Home Visits

Direct - 3/28/2025

Action Type <small>Required</small>	Direct	Type of Contact	Home Visit
Scheduled	3/28/2025	Description	HOME VISIT 2 MAKE UP
Action Date	3/28/2025	Status	Action Completed
		Case Worker	Woolf, Richard
		Hours	1
		Minutes	0

Action Notes

OK Cancel

Save Cancel

CP

19

Enter any brief notes about the status or home visit that you would need to see in ChildPlus

When done, click the "OK" button

Home-Based Home Visits

Direct - 3/28/2025

Action Type Required Direct

Scheduled 3/28/2025

Action Date 3/28/2025

Type of Contact Home Visit

Description HOME VISIT 2 MAKE UP

Action Completed Woolf, Richard

Case Worker Woolf, Richard

Hours 1

Minutes 30

Action Notes

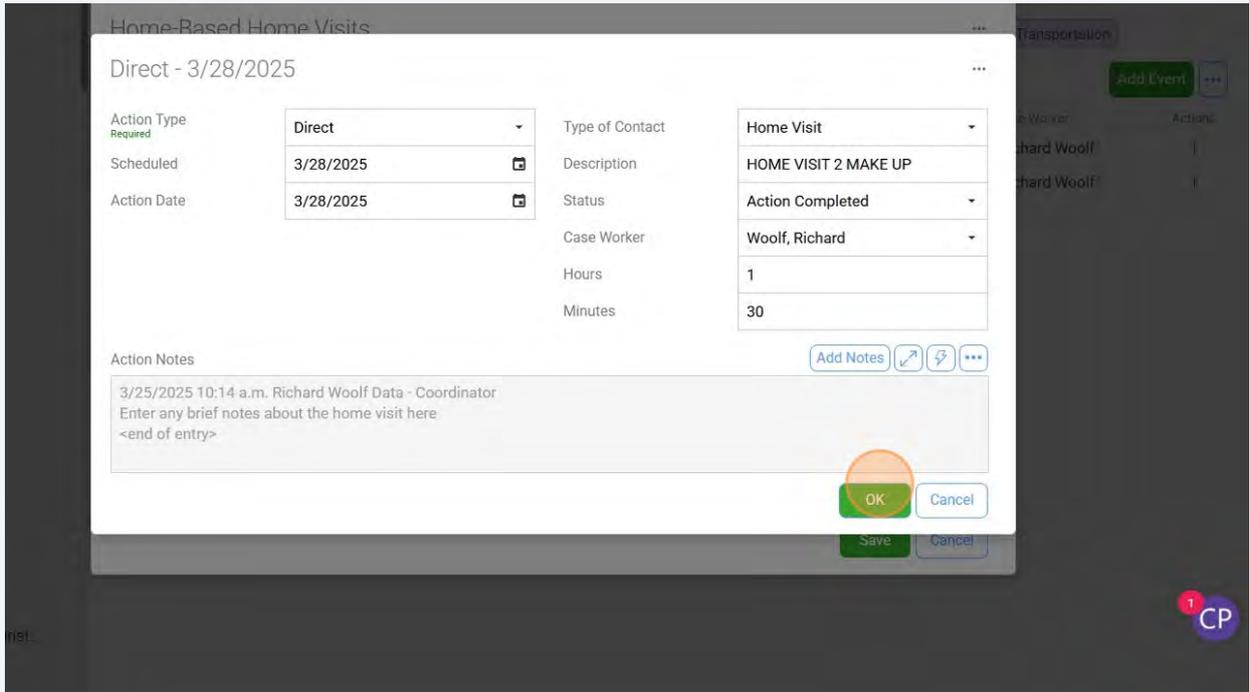
3/25/2025 10:14 a.m. Richard Woolf Data - Coordinator
Enter any brief notes about the home visit here.
<end of entry>

OK Cancel

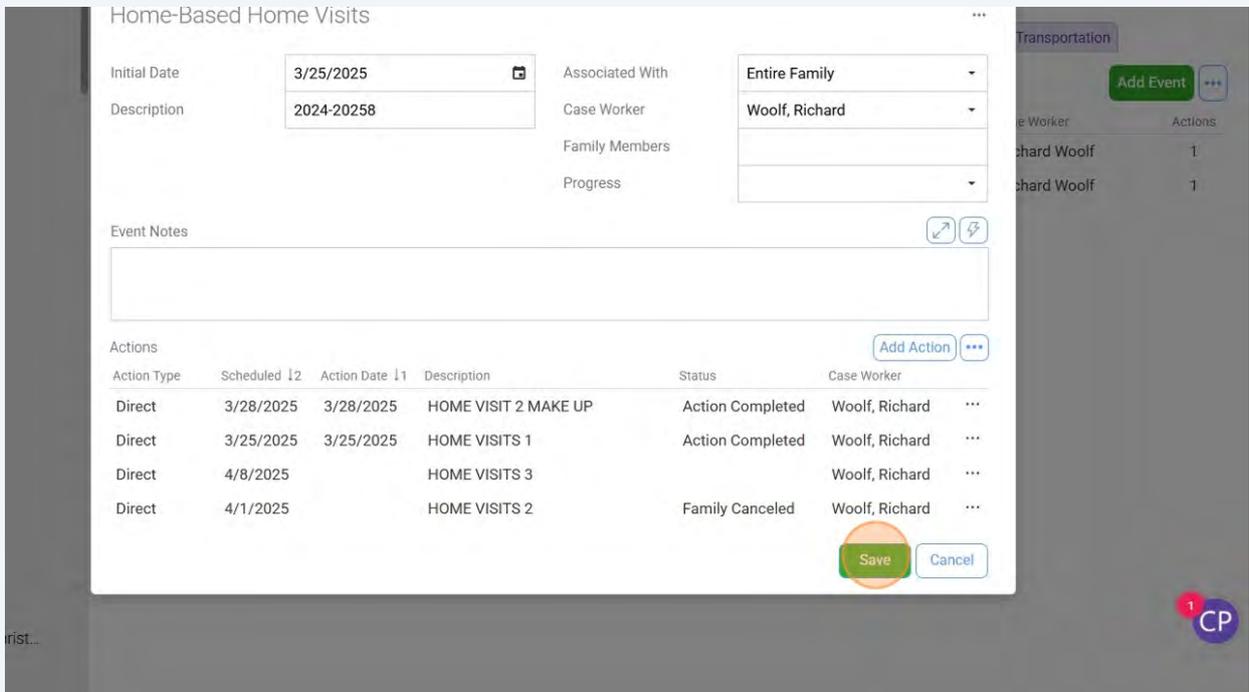


NOTE: More detailed notes about the home visit are likely documented in a separate database application. If so, then you do not need to leave detailed notes in the action as well.

20 Click the "OK" button



21 Click the "Save" button



HOME-BASED HOME VISITS (Part 4)

This guide provides step-by-step instructions for when you need to reschedule home visits, including delete unused home visits and/or need to add additional home visits.

CHANGING MULTIPLE HOME VISIT DATES / HOME VISIT SCHEDULE

1 Click "Family Services"

The screenshot shows a software interface for a patient named BamBam (TEST ONLY) Rubble. The 'Family Services' tab is highlighted with an orange circle. Below the tabs is a table of events.

Date ↓	Event	Description	Associated With	Progress	Time	Case Worker	Actions
3/25/2...	Home-Based Home Visits	2024-20258	Family		3h 0m	Richard Woolf	2
12/14/...	Communication Log		BamBam (TEST ONLY)		0h 0m	Richard Woolf	1

2 Click "Home-Based Home Visits"

The screenshot shows a software interface with a navigation bar at the top containing: Attendance, DRDP Assessment, Entry Express, Management, Performance Panel, Reports, Services, Setup, and To-Do List. On the left is a search bar and a list of family names. The main area displays the profile for BamBam (TEST ONLY) Rubble, including a profile picture, name, gender (Male), DOB (5/08/2020), age (4y 10m), CPID (16206), and enrollment status (Enrolled 3/17/2025 (9d) • Year 1 • EHS 2024-2025 • Miami Valley Child Dev Centers • Clark County Home Base • CHB-01 (1 of 2)). Below the profile are tabs for Application, Attendance, Birth, Disability, Education, Enrollment, Family Services, Health, Immunizations, Mental Health, PIR, and Transportation. Under the Events tab, a table lists events:

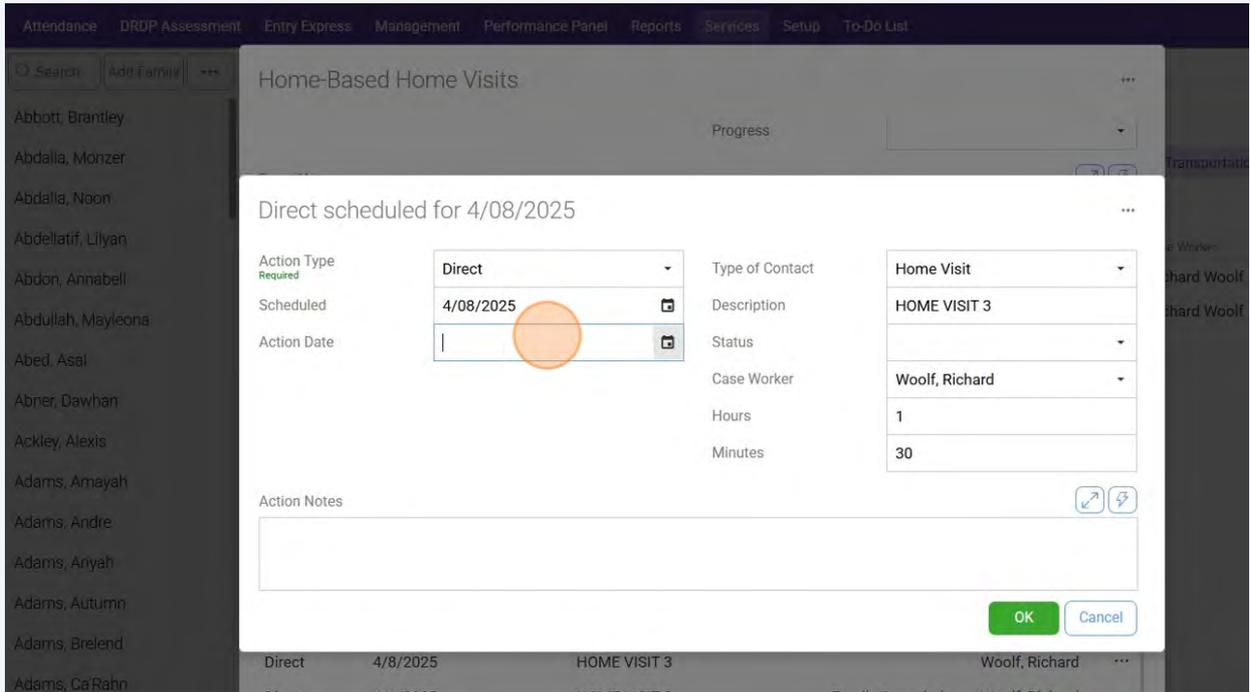
Date	Event	Description	Associated With	Progress	Time	Case Worker
3/25/2...	Home-Based Home Visits	2024-20258	Family		3h 0m	Richard Woolf
12/14/...	Communication Log		BamBam (TEST ONLY)		0h 0m	Richard Woolf

3 Click the last HOME VISIT action that occurred as scheduled

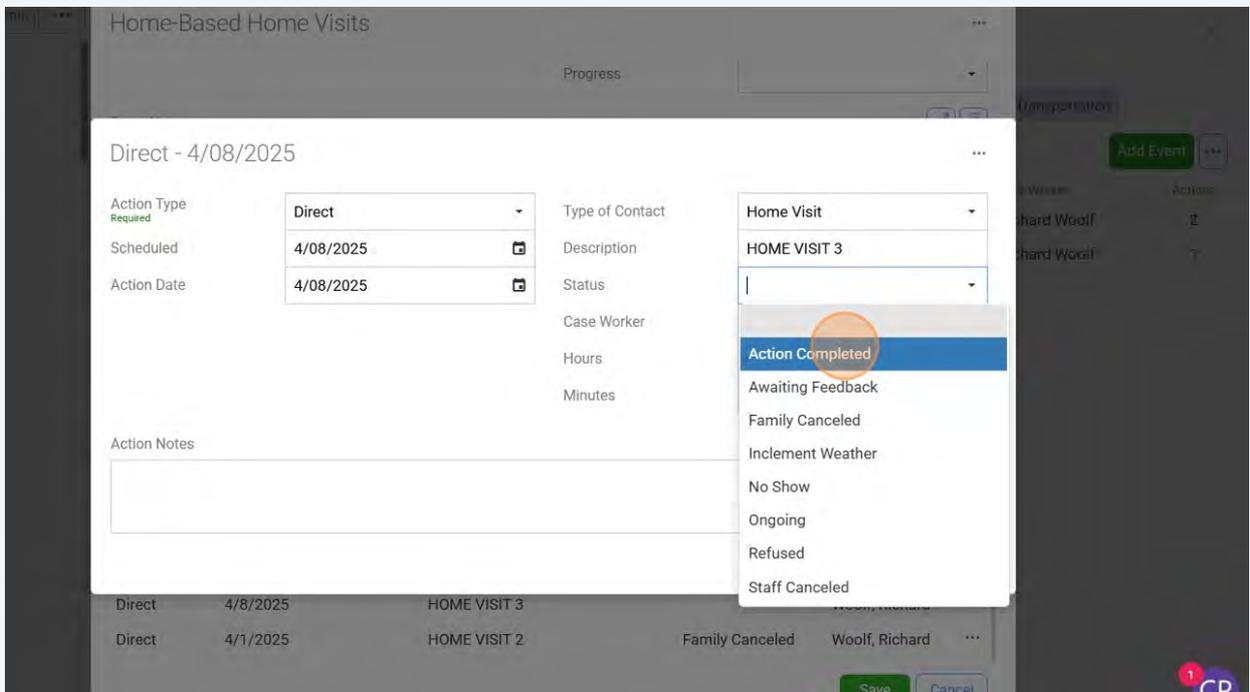
The screenshot shows an 'Event Notes' dialog box with a text area for notes and a table of 'Actions'. The table has columns for Action Type, Scheduled, Action Date, Description, Status, and Case Worker. The 'HOME VISIT 3' row is highlighted with an orange circle.

Action Type	Scheduled	Action Date	Description	Status	Case Worker
Direct	3/28/2025	3/28/2025	HOME VISIT 2 MAKE UP	Action Completed	Woolf, Richard
Direct	3/25/2025	3/25/2025	HOME VISIT 1	Action Completed	Woolf, Richard
Direct	5/27/2025		HOME VISIT 10		Woolf, Richard
Direct	5/20/2025		HOME VISIT 9		Woolf, Richard
Direct	5/13/2025		HOME VISIT 8		Woolf, Richard
Direct	5/6/2025		HOME VISIT 7		Woolf, Richard
Direct	4/29/2025		HOME VISIT 6		Woolf, Richard
Direct	4/22/2025		HOME VISIT 5		Woolf, Richard
Direct	4/15/2025		HOME VISIT 4		Woolf, Richard
Direct	4/8/2025		HOME VISIT 3		Woolf, Richard
Direct	4/1/2025		HOME VISIT 2	Family Canceled	Woolf, Richard

4 Enter the "Action Date" that the home visit occurred



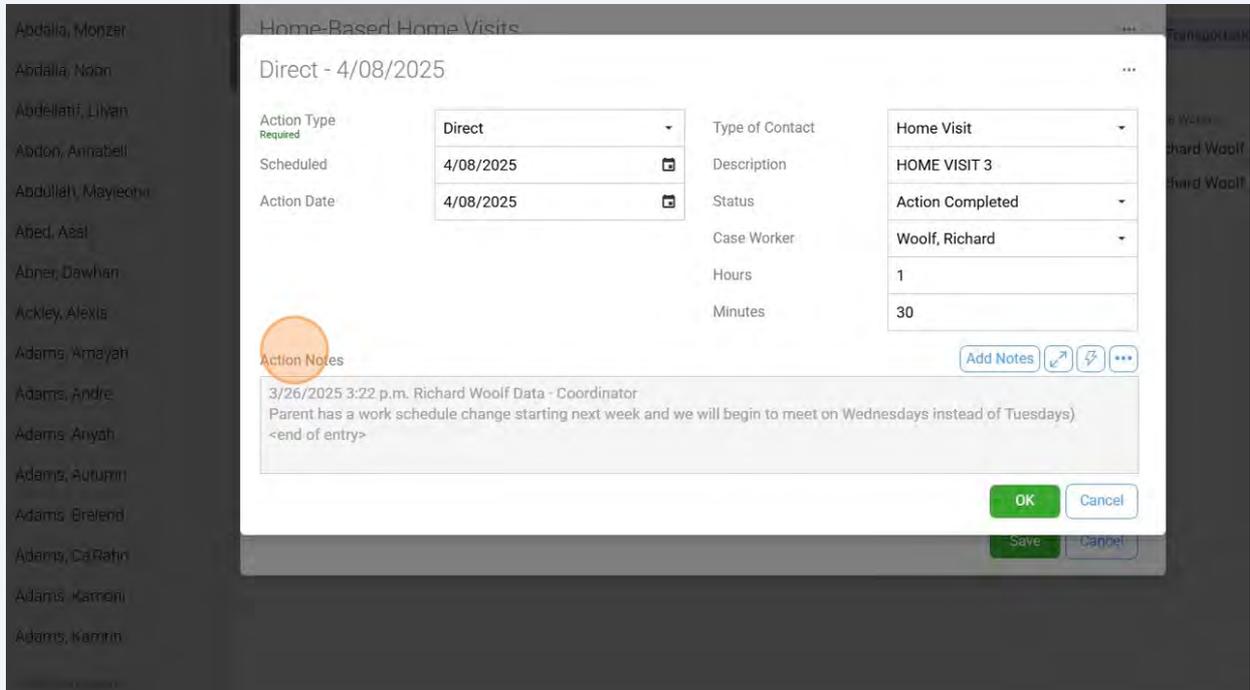
5 Select "Action Completed" as the Status



6

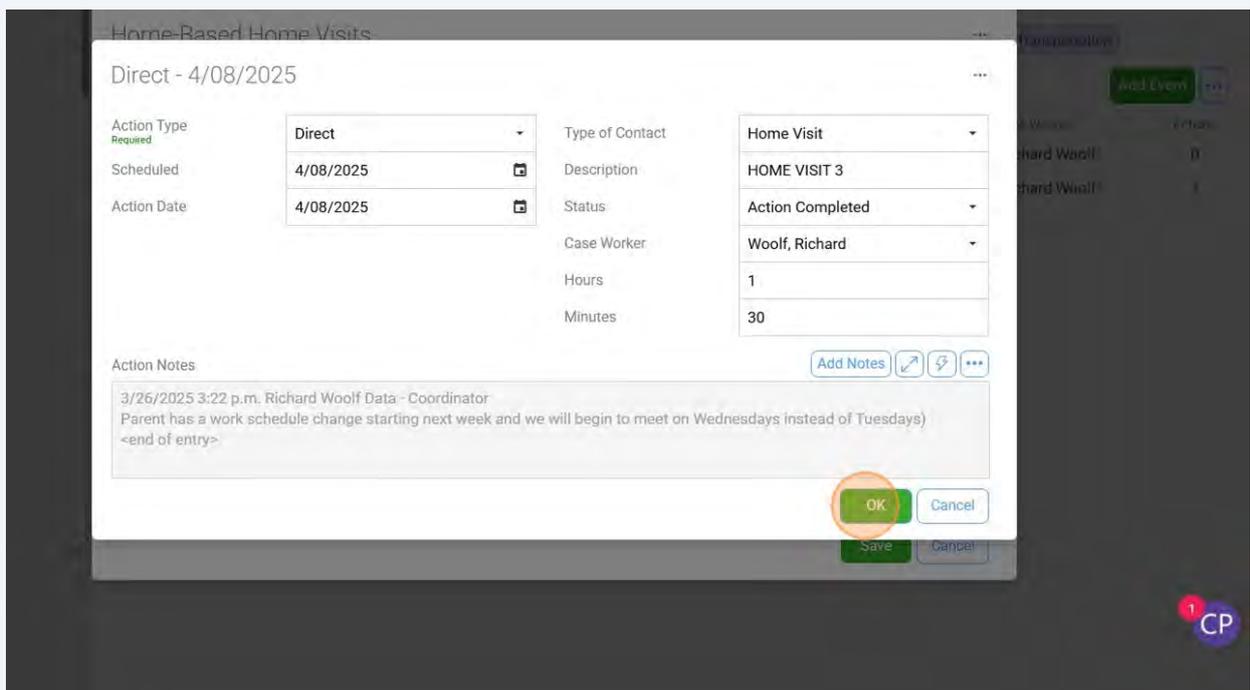
Click into the "Action Notes" field and enter a note that explains why the schedule is changing

For example: Parent has a work schedule change starting next week and we will begin to meet on Wednesdays instead of Tuesdays)



7

Click the "OK" button to close the action



8

(a) You can change the SCHEDULED DATES of the currently scheduled remaining actions and continue using them as normal

(b) Or, you can delete the remaining unused actions and setup new actions using the new schedule

To delete unused actions, click the three "more" dots button

The screenshot displays a software interface for managing home visits. At the top, there is a navigation bar with options like 'Assessment', 'Entry Express', 'Management', 'Performance Panel', 'Reports', 'Services', 'Setup', and 'To-Do List'. Below this, a window titled 'Home-Based Home Visits' is open. It features a 'Progress' dropdown menu and an 'Event Notes' section with a text input field and icons for adding and deleting notes. The main part of the window is a table with the following columns: 'Action Type', 'Scheduled', 'Action Date', 'Description', 'Status', and 'Case Worker'. The table lists several home visits, all with a status of 'Action Completed' and assigned to 'Woolf, Richard'. A 'more' button (three dots) is highlighted in the table header, indicating the option to delete or edit actions.

Action Type	Scheduled	Action Date	Description	Status	Case Worker
Direct	4/8/2025	4/8/2025	HOME VISIT 3	Action Completed	Woolf, Richard
Direct	3/28/2025	3/28/2025	HOME VISIT 2 MAKE UP	Action Completed	Woolf, Richard
Direct	3/25/2025	3/25/2025	HOME VISIT 1	Action Completed	Woolf, Richard
Direct	5/27/2025		HOME VISIT 10		Woolf, Richard
Direct	5/20/2025		HOME VISIT 9		Woolf, Richard
Direct	5/13/2025		HOME VISIT 8		Woolf, Richard
Direct	5/6/2025		HOME VISIT 7		Woolf, Richard
Direct	4/29/2025		HOME VISIT 6		Woolf, Richard
Direct	4/22/2025		HOME VISIT 5		Woolf, Richard
Direct	4/15/2025		HOME VISIT 4		Woolf, Richard

REMOVING SCHEDULED HOME VISITS

9

Select "Remove Future Home Visits" from the drop-down menu

The screenshot shows a software interface with a dark purple header containing navigation tabs: Assessment, Entry Express, Management, Performance Panel, Reports, Services, Setup, and To-Do List. A modal window titled "Home-Based Home Visits" is open, featuring a "Progress" dropdown, an "Event Notes" text area, and a table of actions. A dropdown menu is open over the table, showing "Schedule Home Visits" and "Remove Future Home Visits", with the latter option highlighted by an orange circle. The table lists actions with columns for Action Type, Scheduled, Action Date, Description, Status, and Case Worker.

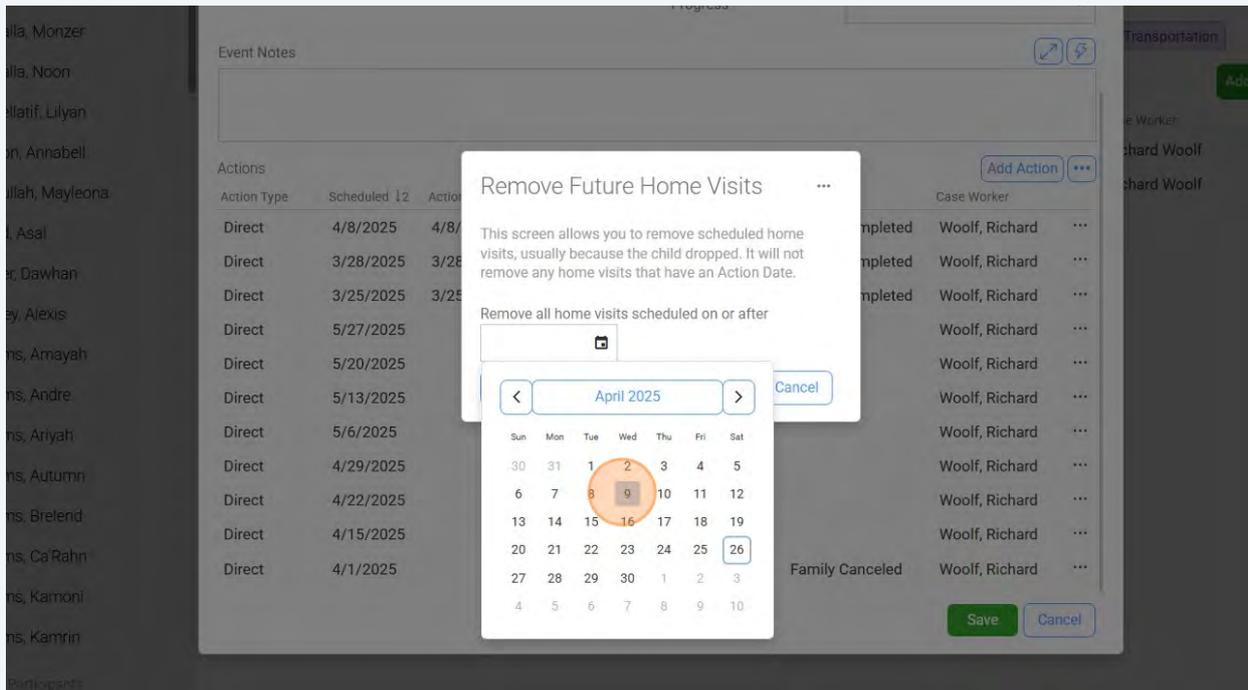
Action Type	Scheduled	Action Date	Description	Status	Case Worker
Direct	4/8/2025	4/8/2025	HOME VISIT 3	Action Completed	Woolf, Richard
Direct	3/28/2025	3/28/2025	HOME VISIT 2 MAKE UP	Action Completed	Woolf, Richard
Direct	3/25/2025	3/25/2025	HOME VISIT 1	Action Completed	Woolf, Richard
Direct	5/27/2025		HOME VISIT 10		Woolf, Richard
Direct	5/20/2025		HOME VISIT 9		Woolf, Richard
Direct	5/13/2025		HOME VISIT 8		Woolf, Richard
Direct	5/6/2025		HOME VISIT 7		Woolf, Richard
Direct	4/29/2025		HOME VISIT 6		Woolf, Richard
Direct	4/22/2025		HOME VISIT 5		Woolf, Richard
Direct	4/15/2025		HOME VISIT 4		Woolf, Richard

10

In the "Remove all home visits scheduled on or after" field, type the date of the day AFTER your most recently completed home visit. Or, type the date of the next home visit you wish to remove

Or, click on the calendar icon, then select the date the date of the day AFTER your most recently completed home visit, or, the date of the next home visit you wish to remove

For Example: If your last completed home visit was on 04/08/2025, you would enter or select 04/09/2025



11 Click the "Remove Scheduled Home Visits" button

The screenshot shows a software interface with a modal dialog titled "Remove Future Home Visits". The dialog contains the following text:

Remove Future Home Visits

This screen allows you to remove scheduled home visits, usually because the child dropped. It will not remove any home visits that have an Action Date.

Remove all home visits scheduled on or after

4/09/2025

Remove Scheduled Home Visits Cancel

The background interface shows a list of actions with columns for Action Type, Scheduled Date, Action Date, Action Description, and Case Worker. The Case Worker is listed as "Woolf, Richard".

12 Click the "OK" button

The screenshot shows a software interface with a confirmation dialog titled "Home Visits Removed". The dialog contains the following text:

Home Visits Removed

7 scheduled home visits were removed

OK

The background interface shows a form for "Home-Based Home Visits" with fields for Initial Date (3/25/2025), Description (2024-20258), Associated With (Entire Family), and Case Worker (Woolf, Richard). Below the form is a table of actions.

Action Type	Scheduled	Action Date	Action Description	Case Worker
Direct	4/8/2025	4/8/2025	HOME VISIT 3	Woolf, Richard
Direct	3/28/2025	3/28/2025	HOME VISIT 2 MAKE UP	Woolf, Richard
Direct	3/25/2025	3/25/2025	HOME VISIT 1	Woolf, Richard
Direct	4/1/2025		HOME VISIT 2	Woolf, Richard

13 Click the "Save" button

The screenshot shows a form titled "Home-Based Home Visits" with the following fields and values:

- Initial Date: 3/25/2025
- Description: 2024-20258
- Associated With: Entire Family
- Case Worker: Woolf, Richard
- Family Members: (empty)
- Progress: (empty)

Below the form is an "Event Notes" section with a text area and two icons (share and refresh). Underneath is an "Actions" table:

Action Type	Scheduled	Action Date	Description	Status	Case Worker
Direct	4/8/2025	4/8/2025	HOME VISIT 3	Action Completed	Woolf, Richard
Direct	3/28/2025	3/28/2025	HOME VISIT 2 MAKE UP	Action Completed	Woolf, Richard
Direct	3/25/2025	3/25/2025	HOME VISIT 1	Action Completed	Woolf, Richard
Direct	4/1/2025		HOME VISIT 2	Family Canceled	Woolf, Richard

At the bottom right of the form, a green "Save" button is circled in orange, next to a "Cancel" button. A "CP" badge is visible in the bottom right corner of the overall interface.

ADDING ADDITIONAL HOME VISITS

14 Click "Home-Based Home Visits"

The screenshot shows a user profile page for "BamBam (TEST ONLY) Rubble". The profile includes the following information:

- Male, DOB: 5/08/2020, 4y 10m, CPID: 16206
- Enrolled 3/17/2025 (9d) • Year 1 • EHS 2024-2025 • Miami Valley Child Dev Centers • Clark County Home Base • CHB-01 (1 of 2)

Navigation tabs include: Application, Attendance, Birth, Disability, Education, Enrollment, Family Services, Health, Immunizations, Mental Health, PIR, Transportation.

Below the tabs is an "Events" table with the following data:

Date	Event	Description	Associated With	Progress	Time	Case Worker
3/25/2...	Home-Based Home Visits	2024-20258	Family		4h 30m	Richard Woolf
12/14/...	Communication Log		BamBam (TEST ONLY)		0h 0m	Richard Woolf

The "Home-Based Home Visits" event is circled in orange. A search bar and a list of family members are visible on the left side of the page.

15 Click the three "more" dots button

The screenshot shows a form titled "Home-Based Home Visits" with the following fields:

- Initial Date: 3/25/2025
- Description: 2024-20258
- Associated With: Entire Family
- Case Worker: Woolf, Richard
- Family Members: (empty)
- Progress: (empty)

Below the form is an "Event Notes" section with a text area and two icons. At the bottom right of the form, the "Add Action" button with three dots is circled in orange. Below the form is a table of actions:

Action Type	Scheduled	Action Date	Description	Status	Case Worker
Direct	4/8/2025	4/8/2025	HOME VISIT 3	Action Completed	Woolf, Richard
Direct	3/28/2025	3/28/2025	HOME VISIT 2 MAKE UP	Action Completed	Woolf, Richard
Direct	3/25/2025	3/25/2025	HOME VISIT 1	Action Completed	Woolf, Richard
Direct	4/1/2025		HOME VISIT 2	Family Canceled	Woolf, Richard

At the bottom of the form are "Save" and "Cancel" buttons. A "CP" icon with a red notification bubble is visible in the bottom right corner.

16 Click "Schedule Home Visits"

This screenshot is identical to the previous one, but with a context menu open over the "Add Action" button. The menu contains two options: "Schedule Home Visits" and "Remove Future Home Visits". The "Schedule Home Visits" option is circled in orange. The rest of the form and table are the same as in the previous screenshot.

17 Follow the same steps for adding new action home-base home visit actions:

Click "For a Home-Based Program"

Attendance DRDP Assessment Entry Express Management Performance Panel Reports Services Setup To-Do List

Search Add Family BamBam (TEST ONLY) Rubble

Schedule Home Visits

For a Home-Based Program
 For a Center-Based Program

Schedule a home visit the same day each week...

Starting

Continuing Until

Agency Worker

Hours

Minutes

Description

Add a counter after the description (e.g. Home Visit 1, Home Visit 2, etc.)

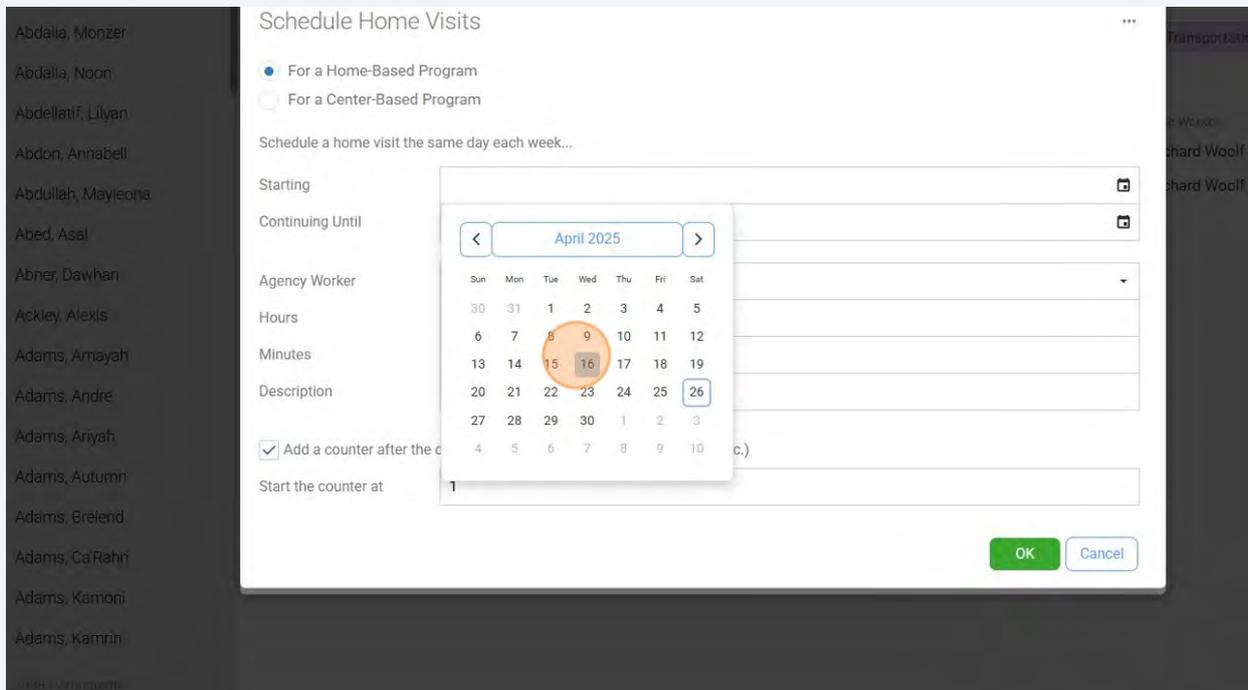
Start the counter at

OK Cancel

18 In the "Starting" field, type the date of the next scheduled home visit

Or, click on the calendar icon, then select the date of the next scheduled home visit

For example: Our last completed home visit was on Tuesday, April 8. So we want to start the next home visit on Wednesday, April 16



19 In the "Continuing Until" field, type the date of the last scheduled home visit

The screenshot shows a 'Schedule Home Visits' form. The 'Starting' date is set to 4/16/2025. The 'Continuing Until' field is empty. A calendar overlay for May 2025 is shown, with the date 23 highlighted in orange. The form includes fields for Agency Worker, Hours, Minutes, and Description. There is a checkbox for 'Add a counter after the c...' and a 'Start the counter at' field. The form has 'OK' and 'Cancel' buttons at the bottom right.



Tip! You can schedule actions all the way until the end of the program year. But it is recommended to only schedule actions out until the last business day before the next big school break (e.g., winter break, spring break, etc.) where visits won't occur. then you can start scheduling actions again after the break.

20 Type the name of the Home Visitor into the "Agency Worker" field

Or, click the down arrow in the "Agency Worker" field and scroll through the list to find the Home Visitor. then, click on the name

The screenshot shows a web form titled "Schedule Home Visits". On the left is a vertical list of names. The form fields include:

- Radio buttons for "For a Home-Based Program" (selected) and "For a Center-Based Program".
- Text: "Schedule a home visit the same day each week..."
- Starting date: 4/16/2025
- Continuing Until: 5/23/2025
- Agency Worker: A dropdown menu with "woolf" typed in. A search results popup is visible with the following data:

Name	Primary Site	Position
Woolf, Richard	Admin Office - Horace	Data - Coordinator
- Hours, Minutes, and Description fields.
- Checkbox: "Add a counter after the description (e.g. Home Visit 1, Home Visit 2, etc.)" (checked).
- Start the counter at: 1
- Buttons: "OK" (green) and "Cancel" (blue).

21

NOTE: A typical Home Visit last 1.5 hours. If your home visits will be scheduled for a different period of time, enter that instead of what was used in this example

Type 1 into the "Hours" field

Type 30 into the "Minutes" field

The screenshot shows a 'Schedule Home Visits' form. The 'Hours' field is highlighted with an orange circle. The form includes the following fields and values:

- Starting: 4/16/2025
- Continuing Until: 5/23/2025
- Agency Worker: Woolf, Richard
- Hours: |
- Minutes: |
- Description: |
- Start the counter at: 1

Buttons: OK, Cancel

22

Type "HOME VISIT" into the "Description" field

The screenshot shows the same 'Schedule Home Visits' form. The 'Description' field is highlighted with an orange circle. The form includes the following fields and values:

- Starting: 4/16/2025
- Continuing Until: 5/23/2025
- Agency Worker: Woolf, Richard
- Hours: 1
- Minutes: 30
- Description: |
- Start the counter at: 1

Buttons: OK, Cancel

23 Click the "Start the counter at" field.

Enter the number you wish the home visits to start at. For continuing Home Visits, this will be the next number after the last previously scheduled action

For example: If the last action was Home Visit 10, then enter 11

The screenshot shows a 'Schedule Home Visits' form with the following fields and values:

- For a Home-Based Program
- For a Center-Based Program
- Schedule a home visit the same day each week...
- Starting: 4/16/2025
- Continuing Until: 5/23/2025
- Agency Worker: Woolf, Richard
- Hours: 1
- Minutes: 30
- Description: HOME VISIT
- Add a counter after the description (e.g. Home Visit 1, Home Visit 2, etc.)
- Start the counter at: 11

The 'Start the counter at' field is highlighted with an orange circle. The form also includes 'OK' and 'Cancel' buttons at the bottom right.

24 Click the "OK" button

Schedule Home Visits

For a Home-Based Program
 For a Center-Based Program

Schedule a home visit the same day each week...

Starting: 4/16/2025
 Continuing Until: 5/23/2025

Agency Worker: Woolf, Richard
 Hours: 1
 Minutes: 30
 Description: HOME VISIT

Add a counter after the description (e.g. Home Visit 1, Home Visit 2, etc.)
 Start the counter at: 4

OK Cancel

25 The newly added home visits have been added to the list of actions and the description numbers continued after the previously scheduled actions

Home-Based Home Visits

Initial Date: 3/25/2025
 Description: 2024-2025
 Associated With: Entire Family
 Case Worker: Woolf, Richard

Event Notes

Action Type	Scheduled	Action Date	Description	Status	Case Worker	Referred To
Direct	5/21/2025		HOME VISIT 9		Woolf, Richard	...
Direct	5/14/2025		HOME VISIT 8		Woolf, Richard	...
Direct	5/7/2025		HOME VISIT 7		Woolf, Richard	...
Direct	4/30/2025		HOME VISIT 6		Woolf, Richard	...
Direct	4/23/2025		HOME VISIT 5		Woolf, Richard	...
Direct	4/16/2025		HOME VISIT 4		Woolf, Richard	...
Direct	4/8/2025	4/8/2025	HOME VISIT 3	Action Completed	Woolf, Richard	...
Direct	4/1/2025	4/1/2025	HOME VISIT 2	Action Completed	Woolf, Richard	...

Save Cancel

26 Click the "Save" button to exit the event

Initial Date: 3/25/2025

Description: 2024-2025

Associated With: Entire Family

Case Worker: Woolf, Richard

Family Members:

Progress:

Event Notes:

Actions

Action Type	Scheduled	Action Date	Description	Status	Case Worker	Referred To
Direct	5/20/2025		HOME VISIT 9		Woolf, Richard	...
Direct	5/13/2025		HOME VISIT 8		Woolf, Richard	...
Direct	5/6/2025		HOME VISIT 7		Woolf, Richard	...
Direct	4/29/2025		HOME VISIT 6		Woolf, Richard	...
Direct	4/22/2025		HOME VISIT 5		Woolf, Richard	...
Direct	4/15/2025		HOME VISIT 4		Woolf, Richard	...
Direct	4/8/2025		HOME VISIT 3		Woolf, Richard	...
Direct	4/1/2025		HOME VISIT 2		Woolf, Richard	...

Save Cancel

HOME-BASED HOME VISITS (Part 6)

This guide provides step-by-step instructions for when you need to delete unused home visits.

IF FAMILY DROPS OR SWITCHES TO CENTER-BASED

1 Click "Family Services"

The screenshot shows a user interface for a family profile. The top navigation bar includes 'Assessment', 'Entry Express', 'Management', 'Performance Panel', 'Reports', 'Services', 'Setup', and 'To-Do List'. The profile is for 'BamBam (TEST ONLY) Rubble', a 4-year-old male. The 'Family Services' tab is highlighted with an orange circle. Below the tabs, there is a table of events.

Date ↓	Event	Description	Associated With	Progress	Time	Case Worker	Actions
3/25/2...	Home-Based Home Visits	2024-20258	Family		3h 0m	Richard Woolf	2
12/14/...	Communication Log		BamBam (TEST ONLY)		0h 0m	Richard Woolf	1

2 Click "Home-Based Home Visits"

Attendance DRDP Assessment Entry Express Management Performance Panel Reports Services Setup To-Do List

Search Add Family

BamBam (TEST ONLY) Rubble Male DOB: 5/08/2020 4y 10m CPID: 16206
Enrolled 3/17/2025 (9d) • Year 1 • EHS 2024-2025 • Miami Valley Child Dev Centers • Clark County Home Base • CHB-01 (1 of 2)

Application Attendance Birth Disability Education Enrollment Family Services Health Immunizations Mental Health PIR Transportatic

Attachments Events FPA, Needs Assessment, PIR Family Engagement Contract Family Outcomes Family Partnership Tracker Information

Date ↓	Event	Description	Associated With	Progress	Time	Case Worker
3/25/2...	Home-Based Home Visits	2024-20258	Family		3h 0m	Richard Woolf
12/14/...	Communication Log		BamBam (TEST ONLY)		0h 0m	Richard Woolf

ADD AN EXPLANATION FOR WHY HOME VISITS ARE ENDING

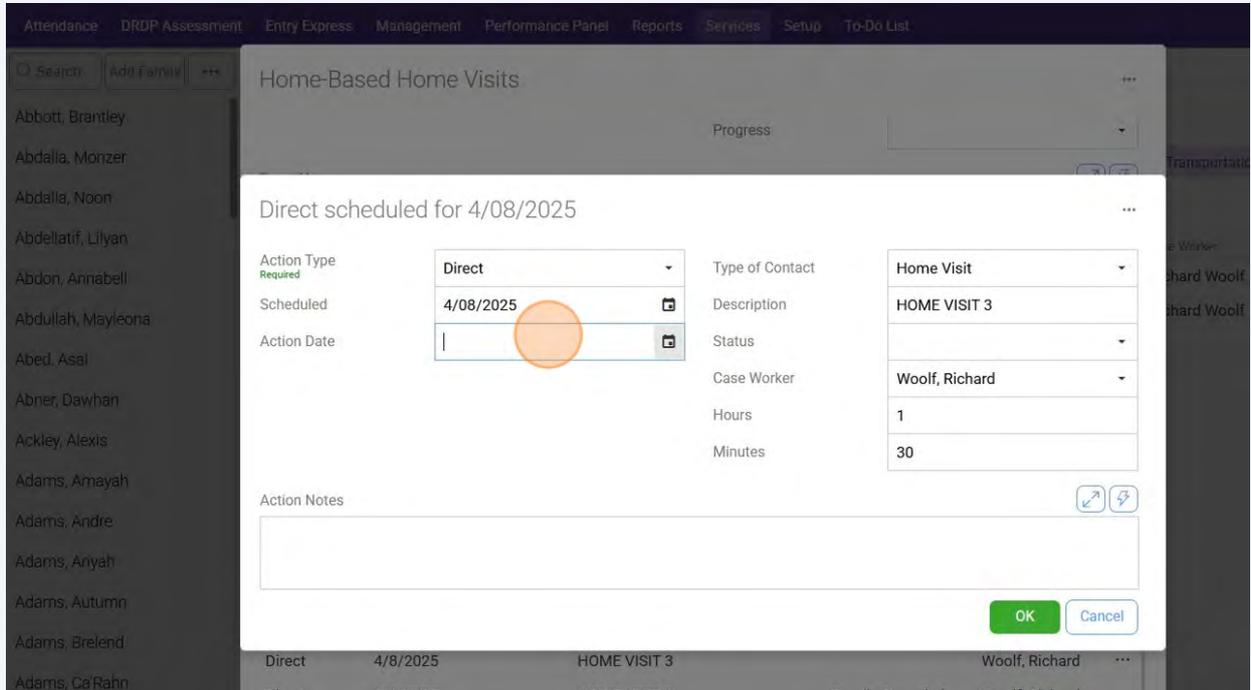
3 Click the last HOME VISIT action that occurred as scheduled

Event Notes

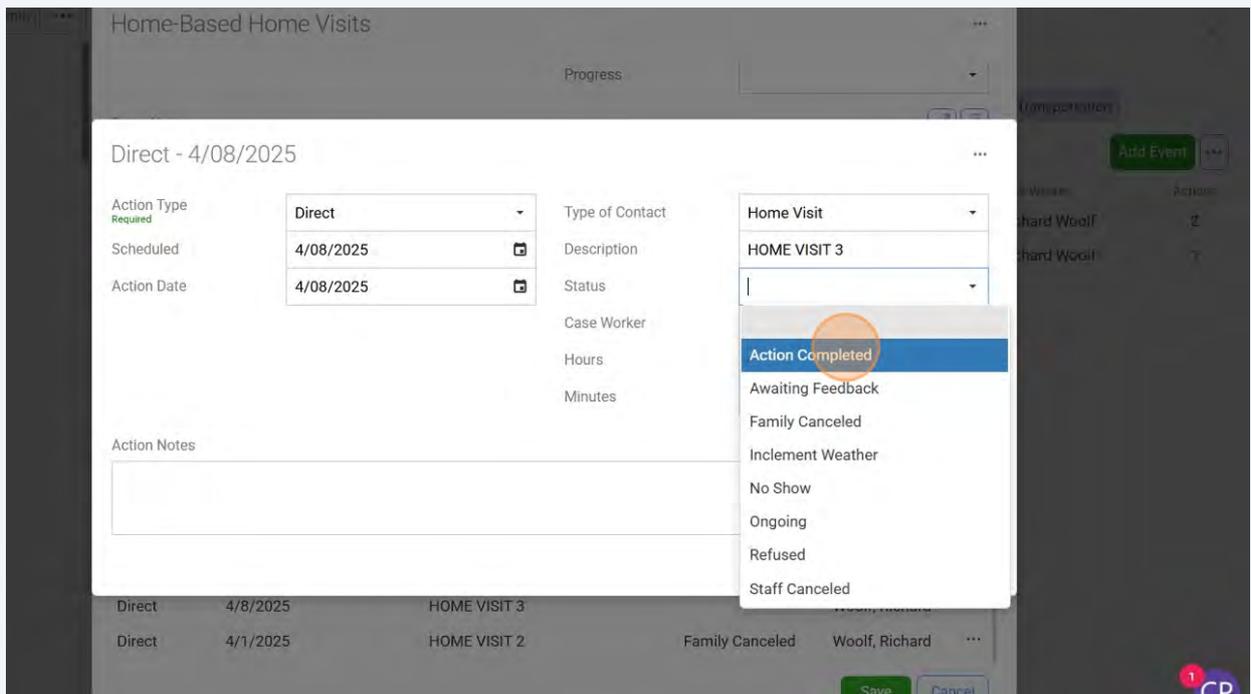
Action Type	Scheduled ↓2	Action Date ↓1	Description	Status	Case Worker
Direct	3/28/2025	3/28/2025	HOME VISIT 2 MAKE UP	Action Completed	Woolf, Richard
Direct	3/25/2025	3/25/2025	HOME VISIT 1	Action Completed	Woolf, Richard
Direct	5/27/2025		HOME VISIT 10		Woolf, Richard
Direct	5/20/2025		HOME VISIT 9		Woolf, Richard
Direct	5/13/2025		HOME VISIT 8		Woolf, Richard
Direct	5/6/2025		HOME VISIT 7		Woolf, Richard
Direct	4/29/2025		HOME VISIT 6		Woolf, Richard
Direct	4/22/2025		HOME VISIT 5		Woolf, Richard
Direct	4/15/2025		HOME VISIT 4		Woolf, Richard
Direct	4/8/2025		HOME VISIT 3		Woolf, Richard
Direct	4/1/2025		HOME VISIT 2	Family Canceled	Woolf, Richard

Save Cancel

4 Enter the "Action Date" that the home visit occurred



5 Select "Action Completed" as the Status



6

Click into the "Action Notes" field and enter a note that explains why the student will no longer need home-based home visits

FOR EXAMPLE:

Family is moving out of area. Student dropped on 04/08/2024.

Student is moving from home-based program to center based program on 04/08/2024

Home-Based Home Visits

Direct - 4/08/2025

Action Type <small>Required</small>	Direct	Type of Contact	Home Visit
Scheduled	4/08/2025	Description	HOME VISIT 3
Action Date	4/08/2025	Status	Action Completed
		Case Worker	Woolf, Richard
		Hours	1
		Minutes	30

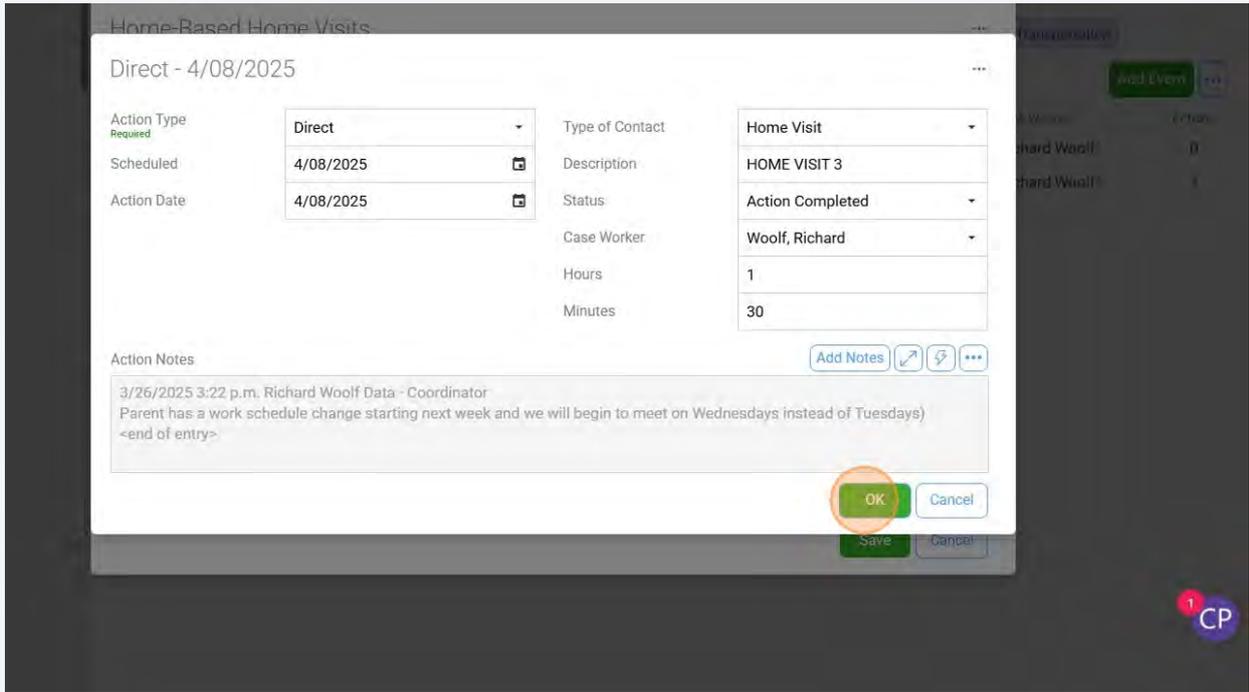
Action Notes

3/26/2025 3:22 p.m. Richard Woolf Data - Coordinator
Parent has a work schedule change starting next week and we will begin to meet on Wednesdays instead of Tuesdays)
<end of entry>

OK Cancel

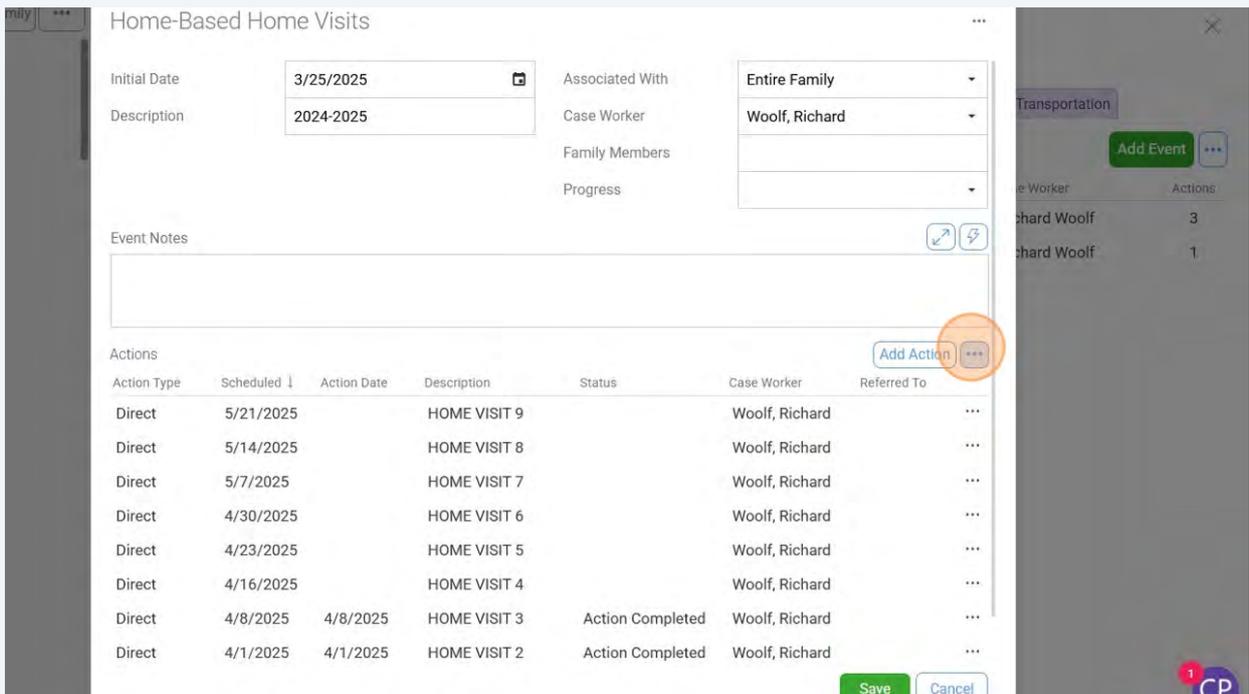
Save Cancel

7 Click the "OK" button to close the action



REMOVING SCHEDULED HOME VISITS

8 Click the three "more" dots button



9

Select "Remove Future Home Visits" from the drop-down menu

The screenshot shows a software interface with a dark blue header containing navigation tabs: Assessment, Entry Express, Management, Performance Panel, Reports, Services, Setup, and To-Do List. A window titled "Home-Based Home Visits" is open, featuring a "Progress" dropdown menu, an "Event Notes" text area, and an "Add Action" button. A dropdown menu is open from the "Add Action" button, with "Remove Future Home Visits" highlighted in orange. Below the dropdown is a table of actions.

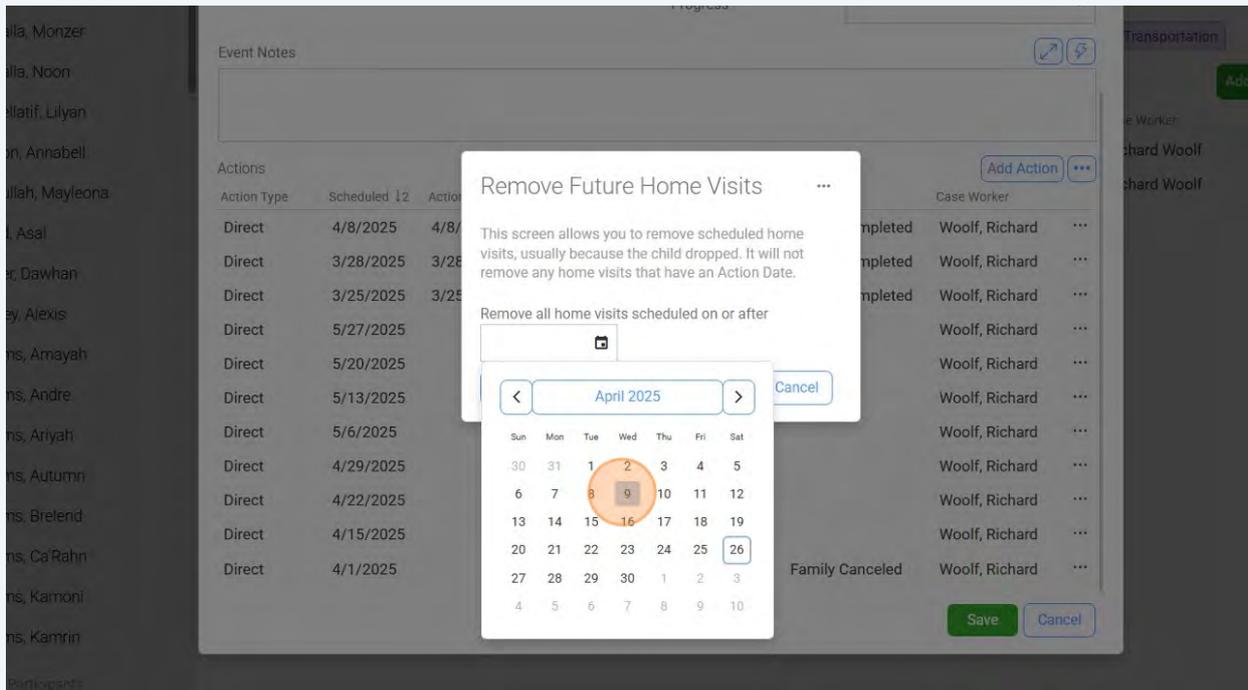
Action Type	Scheduled ↓2	Action Date ↓1	Description	Status	Case Worker
Direct	4/8/2025	4/8/2025	HOME VISIT 3	Action Completed	Woolf, Richard
Direct	3/28/2025	3/28/2025	HOME VISIT 2 MAKE UP	Action Completed	Woolf, Richard
Direct	3/25/2025	3/25/2025	HOME VISIT 1	Action Completed	Woolf, Richard
Direct	5/27/2025		HOME VISIT 10		Woolf, Richard
Direct	5/20/2025		HOME VISIT 9		Woolf, Richard
Direct	5/13/2025		HOME VISIT 8		Woolf, Richard
Direct	5/6/2025		HOME VISIT 7		Woolf, Richard
Direct	4/29/2025		HOME VISIT 6		Woolf, Richard
Direct	4/22/2025		HOME VISIT 5		Woolf, Richard
Direct	4/15/2025		HOME VISIT 4		Woolf, Richard

10

In the "Remove all home visits scheduled on or after" field, type the date of the day AFTER your most recently completed home visit. Or, type the date of the next home visit you wish to remove

Or, click on the calendar icon, then select the date the date of the day AFTER your most recently completed home visit, or, the date of the next home visit you wish to remove

For Example: If your last completed home visit was on 04/08/2025, you would enter or select 04/09/2025



11 Click the "Remove Scheduled Home Visits" button

The screenshot shows a software interface with a modal dialog titled "Remove Future Home Visits". The dialog contains the following text:

Remove Future Home Visits

This screen allows you to remove scheduled home visits, usually because the child dropped. It will not remove any home visits that have an Action Date.

Remove all home visits scheduled on or after

4/09/2025

Remove Scheduled Home Visits Cancel

The background interface shows a list of actions with columns for Action Type, Scheduled Date, Action Date, Action Description, and Case Worker. The Case Worker listed is "Woolf, Richard".

12 Click the "OK" button

The screenshot shows a software interface with a confirmation dialog titled "Home Visits Removed". The dialog contains the following text:

Home Visits Removed

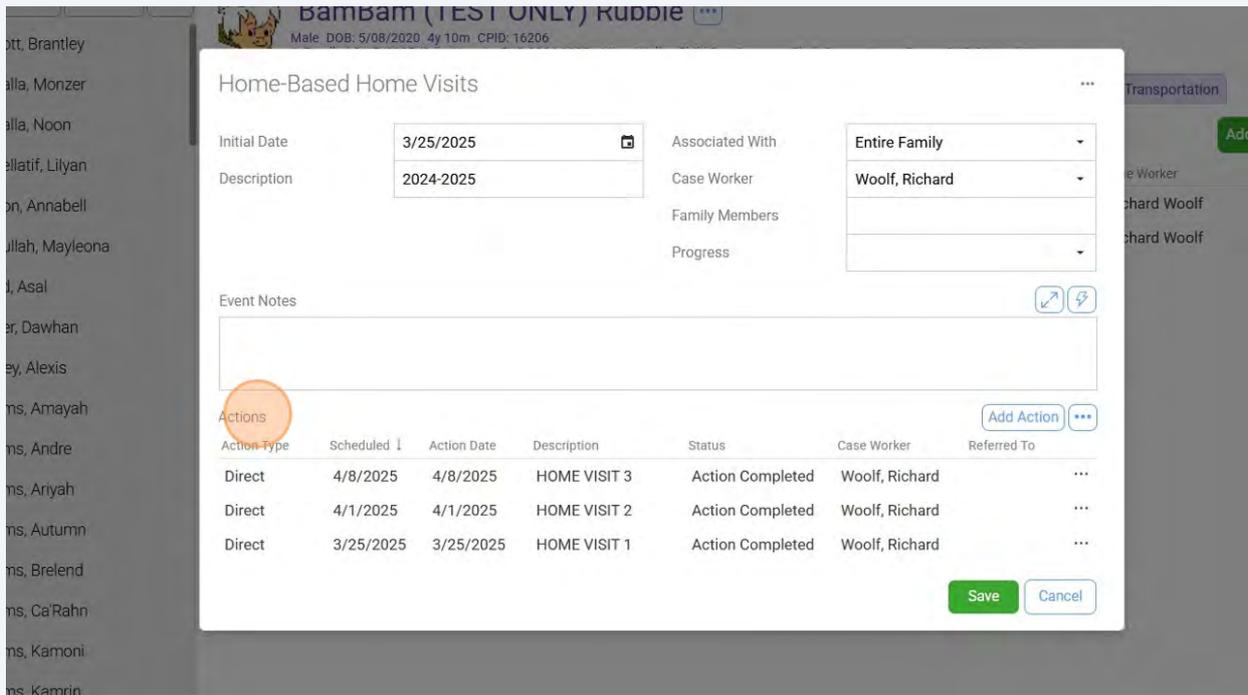
7 scheduled home visits were removed

OK

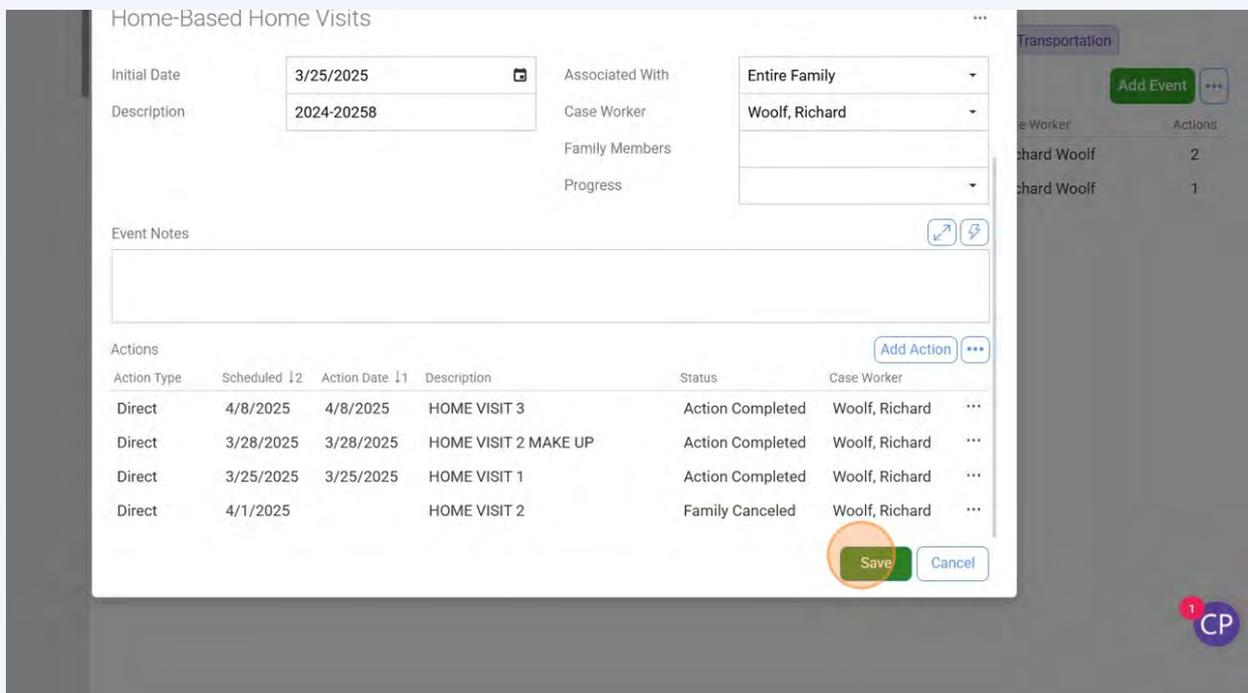
The background interface shows a form for "Home-Based Home Visits" with fields for Initial Date (3/25/2025), Description (2024-20258), Associated With (Entire Family), and Case Worker (Woolf, Richard). Below the form is a table of actions.

Action Type	Scheduled	Action Date	Action Description	Case Worker
Direct	4/8/2025	4/8/2025	HOME VISIT 3	Woolf, Richard
Direct	3/28/2025	3/28/2025	HOME VISIT 2 MAKE UP	Woolf, Richard
Direct	3/25/2025	3/25/2025	HOME VISIT 1	Woolf, Richard
Direct	4/1/2025		HOME VISIT 2	Woolf, Richard

13 The scheduled home visits on or after 04/16/2024 have now been removed



14 Click the "Save" button to exit the event



HOME-BASED HOME VISITS (Part 6)

This guide provides step-by-step instructions for when you need to delete unused home visits.

IF FAMILY DROPS OR SWITCHES TO CENTER-BASED

1 Click "Family Services"

The screenshot shows a software interface for a child named BamBam (TEST ONLY) Rubble. The 'Services' menu is open, and the 'Family Services' tab is selected and highlighted with an orange circle. Below the tabs, there is a table of events.

Date ↓	Event	Description	Associated With	Progress	Time	Case Worker	Actions
3/25/2...	Home-Based Home Visits	2024-20258	Family		3h 0m	Richard Woolf	2
12/14/...	Communication Log		BamBam (TEST ONLY)		0h 0m	Richard Woolf	1

2 Click "Home-Based Home Visits"

Attendance DRDP Assessment Entry Express Management Performance Panel Reports Services Setup To-Do List

Search Add Family

BamBam (TEST ONLY) Rubble Male DOB: 5/08/2020 4y 10m CPID: 16206
Enrolled 3/17/2025 (9d) • Year 1 • EHS 2024-2025 • Miami Valley Child Dev Centers • Clark County Home Base • CHB-01 (1 of 2)

Application Attendance Birth Disability Education Enrollment Family Services Health Immunizations Mental Health PIR Transportatic

Attachments Events FPA, Needs Assessment, PIR Family Engagement Contract Family Outcomes Family Partnership Tracker Information

Date ↓	Event	Description	Associated With	Progress	Time	Case Worker
3/25/2...	Home-Based Home Visits	2024-20258	Family		3h 0m	Richard Woolf
12/14/...	Communication Log		BamBam (TEST ONLY)		0h 0m	Richard Woolf

ADD AN EXPLANATION FOR WHY HOME VISITS ARE ENDING

3 Click the last HOME VISIT action that occurred as scheduled

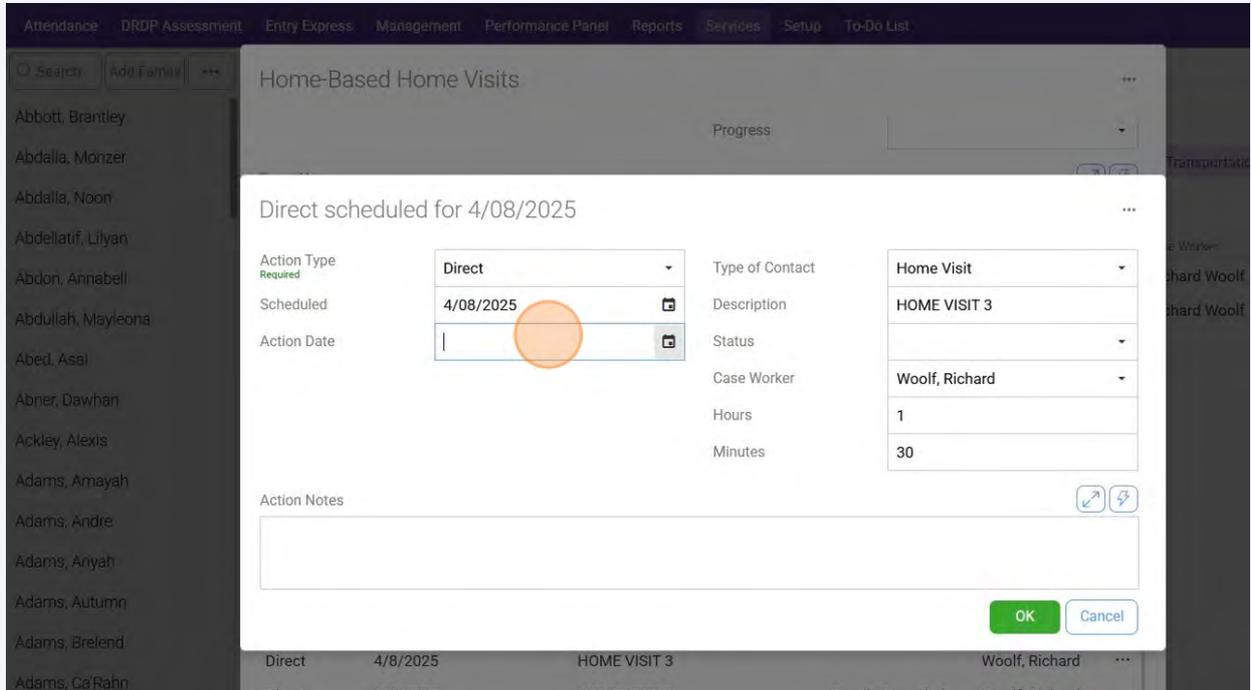
Event Notes

Actions

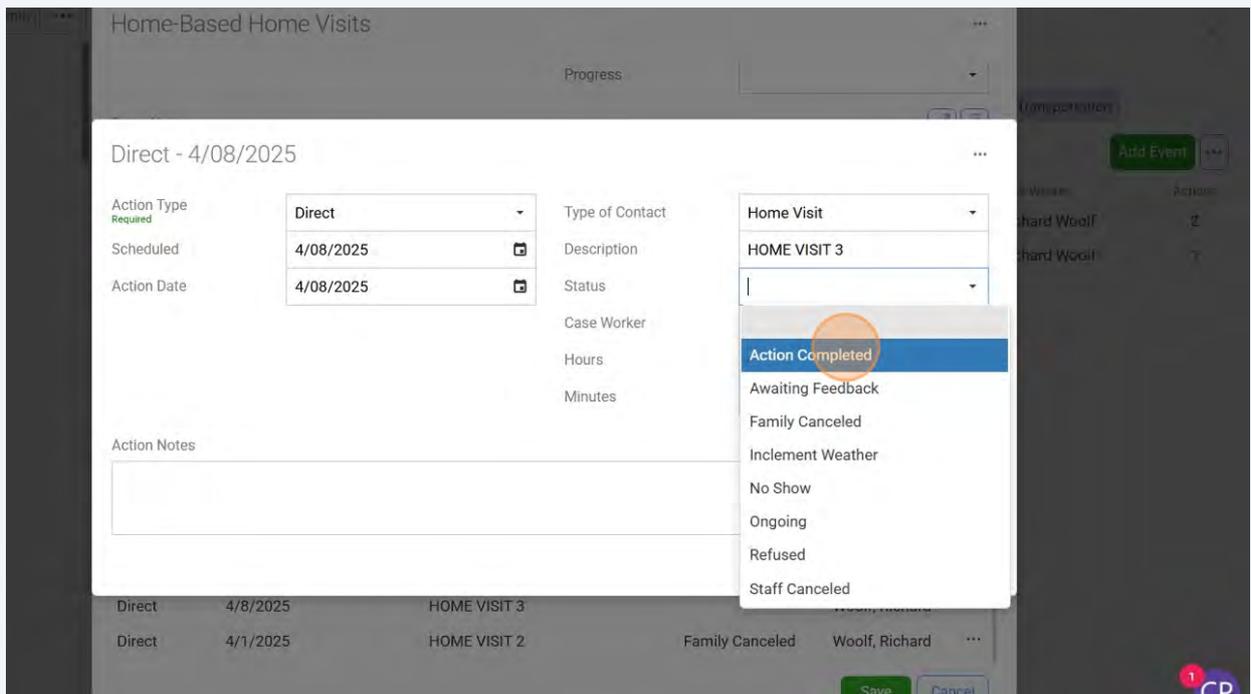
Action Type	Scheduled ↓2	Action Date ↓1	Description	Status	Case Worker
Direct	3/28/2025	3/28/2025	HOME VISIT 2 MAKE UP	Action Completed	Woolf, Richard
Direct	3/25/2025	3/25/2025	HOME VISIT 1	Action Completed	Woolf, Richard
Direct	5/27/2025		HOME VISIT 10		Woolf, Richard
Direct	5/20/2025		HOME VISIT 9		Woolf, Richard
Direct	5/13/2025		HOME VISIT 8		Woolf, Richard
Direct	5/6/2025		HOME VISIT 7		Woolf, Richard
Direct	4/29/2025		HOME VISIT 6		Woolf, Richard
Direct	4/22/2025		HOME VISIT 5		Woolf, Richard
Direct	4/15/2025		HOME VISIT 4		Woolf, Richard
Direct	4/8/2025		HOME VISIT 3		Woolf, Richard
Direct	4/1/2025		HOME VISIT 2	Family Canceled	Woolf, Richard

Save Cancel

4 Enter the "Action Date" that the home visit occurred



5 Select "Action Completed" as the Status



6

Click into the "Action Notes" field and enter a note that explains why the student will no longer need home-based home visits

FOR EXAMPLE:

Family is moving out of area. Student dropped on 04/08/2024.

Student is moving from home-based program to center based program on 04/08/2024

The screenshot shows a software interface for "Home-Based Home Visits". The main form is titled "Direct - 4/08/2025". It contains the following fields:

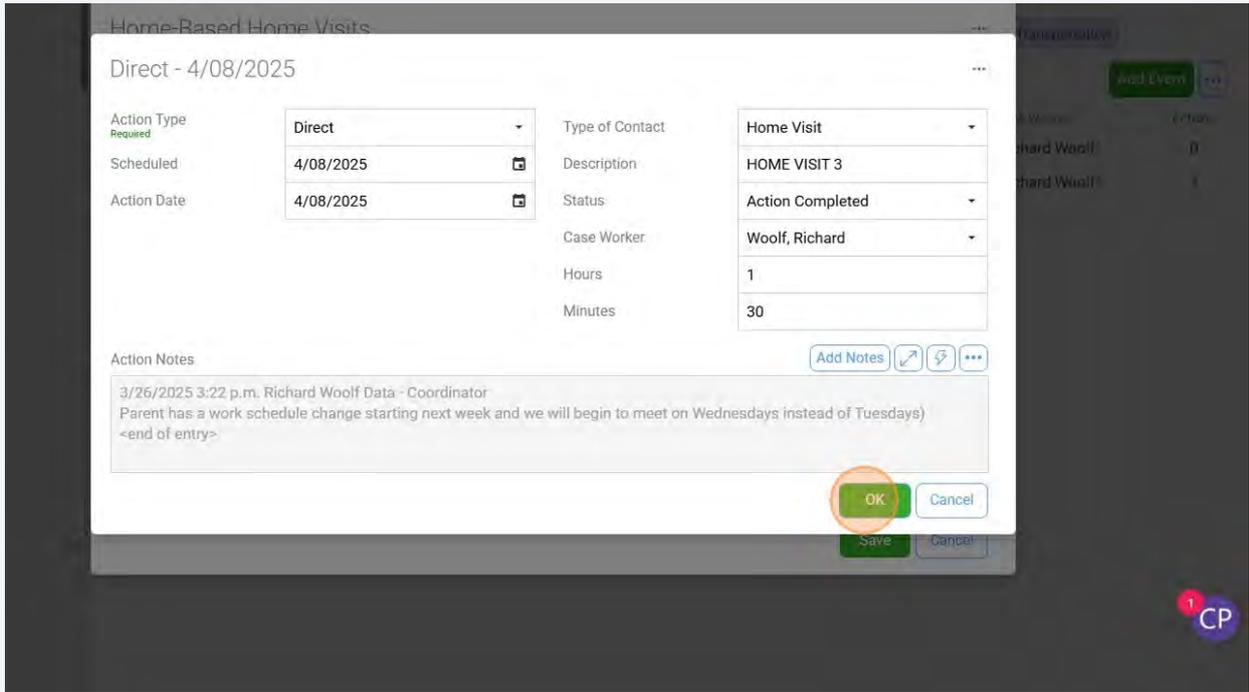
Action Type	Direct	Type of Contact	Home Visit
Scheduled	4/08/2025	Description	HOME VISIT 3
Action Date	4/08/2025	Status	Action Completed
		Case Worker	Woolf, Richard
		Hours	1
		Minutes	30

The "Action Notes" field is highlighted with an orange circle and contains the following text:

3/26/2025 3:22 p.m. Richard Woolf Data - Coordinator
Parent has a work schedule change starting next week and we will begin to meet on Wednesdays instead of Tuesdays)
<end of entry>

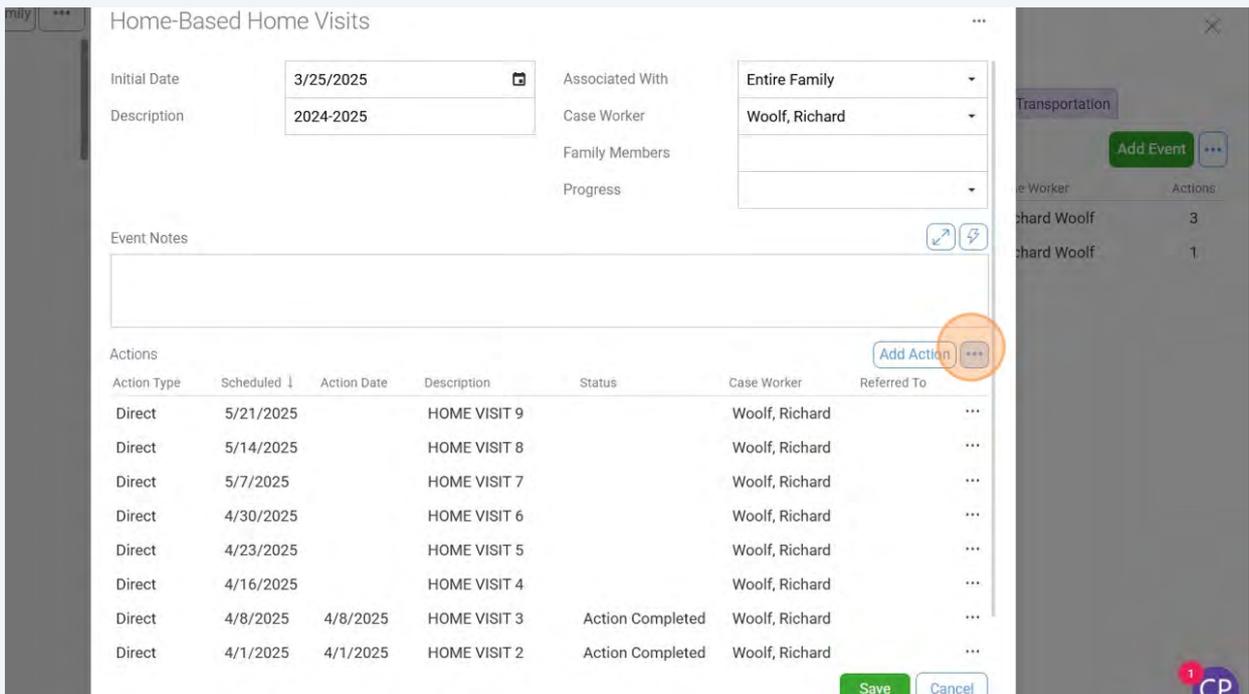
Buttons for "Add Notes", "OK", "Cancel", "Save", and "Cancel" are visible at the bottom of the form.

7 Click the "OK" button to close the action



REMOVING SCHEDULED HOME VISITS

8 Click the three "more" dots button



9

Select "Remove Future Home Visits" from the drop-down menu

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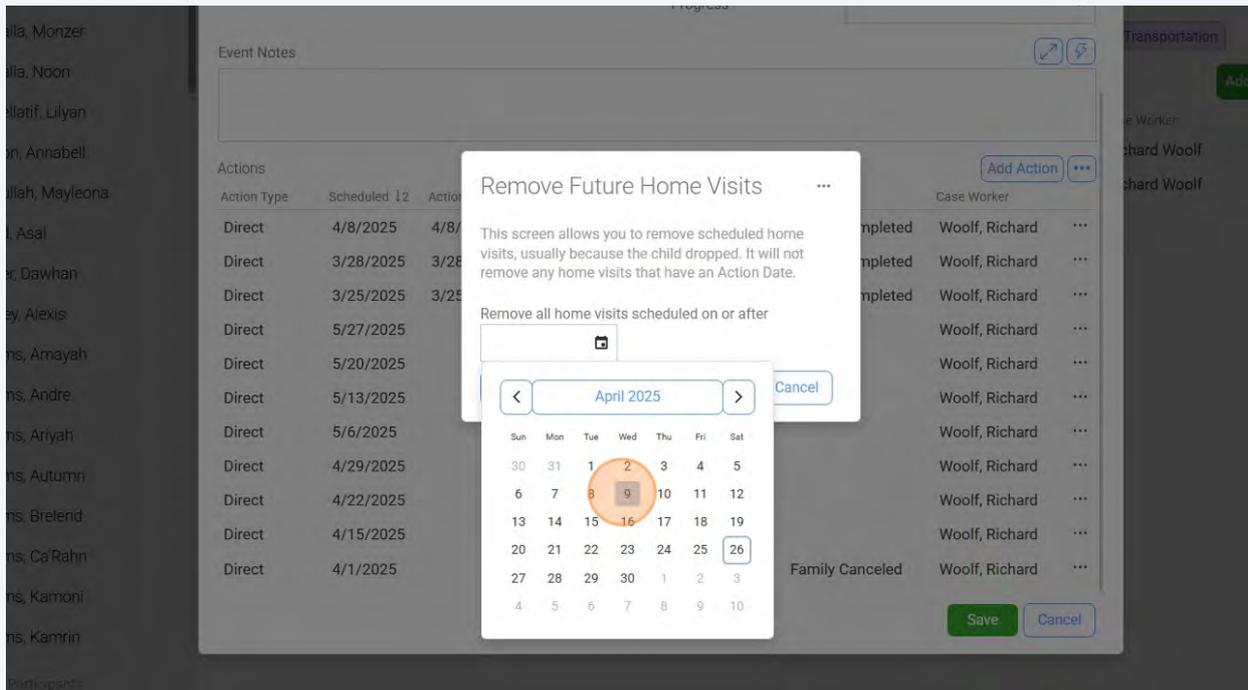
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Direct	3/25/2025	3/25/2025	HOME VISIT 1	Action Completed	Woolf, Richard
Direct	5/27/2025		HOME VISIT 10		Woolf, Richard
Direct	5/20/2025		HOME VISIT 9		Woolf, Richard
Direct	5/13/2025		HOME VISIT 8		Woolf, Richard
Direct	5/6/2025		HOME VISIT 7		Woolf, Richard
Direct	4/29/2025		HOME VISIT 6		Woolf, Richard
Direct	4/22/2025		HOME VISIT 5		Woolf, Richard
Direct	4/15/2025		HOME VISIT 4		Woolf, Richard

10

In the "Remove all home visits scheduled on or after" field, type the date of the day AFTER your most recently completed home visit. Or, type the date of the next home visit you wish to remove

Or, click on the calendar icon, then select the date the date of the day AFTER your most recently completed home visit, or, the date of the next home visit you wish to remove

For Example: If your last completed home visit was on 04/08/2025, you would enter or select 04/09/2025



11 Click the "Remove Scheduled Home Visits" button

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Remove all home visits scheduled on or after

4/09/2025

Remove Scheduled Home Visits Cancel

The background interface shows a list of actions with columns for Action Type, Scheduled Date, Action Date, Action Description, and Case Worker. The Case Worker column lists "Woolf, Richard".

12 Click the "OK" button

The screenshot shows a software interface with a confirmation dialog titled "Home Visits Removed". The dialog contains the following text:

Home Visits Removed

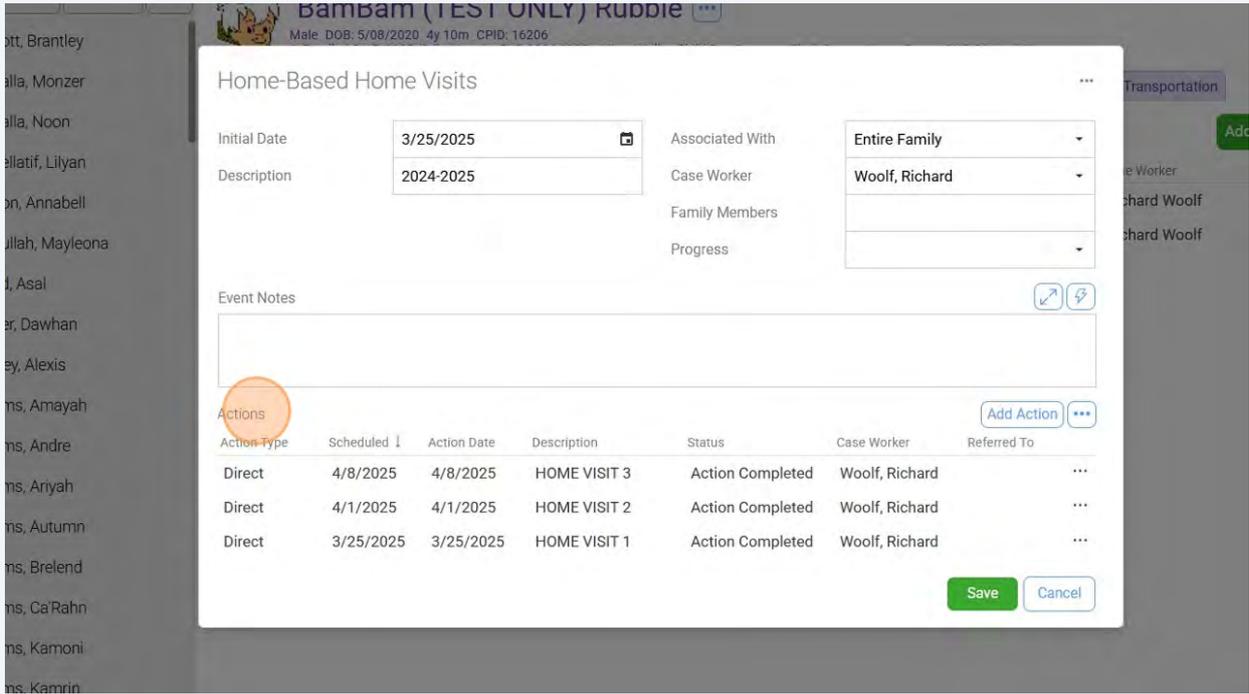
7 scheduled home visits were removed

OK

The background interface shows a form for "Home-Based Home Visits" with fields for Initial Date (3/25/2025), Description (2024-20258), Associated With (Entire Family), and Case Worker (Woolf, Richard). Below the form is a table of actions.

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Direct	3/25/2025	3/25/2025	HOME VISIT 1	Woolf, Richard
Direct	4/1/2025		HOME VISIT 2	Woolf, Richard

13 The scheduled home visits on or after 04/16/2024 have now been removed



14 Click the "Save" button to exit the event

